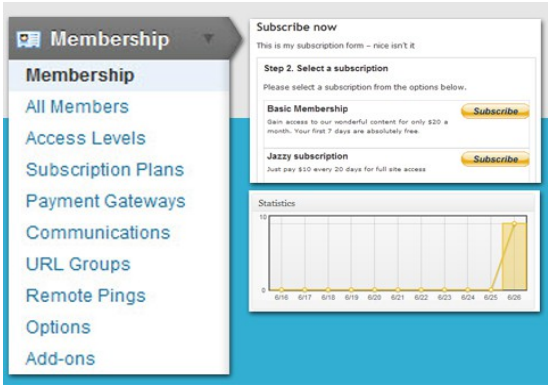
Membership Premium 3.1.0

Docs 3.1.0.1



So the brand spanking new Membership plugin is here, I bet you are eager to download this puppy and get it installed. So lets crack on!

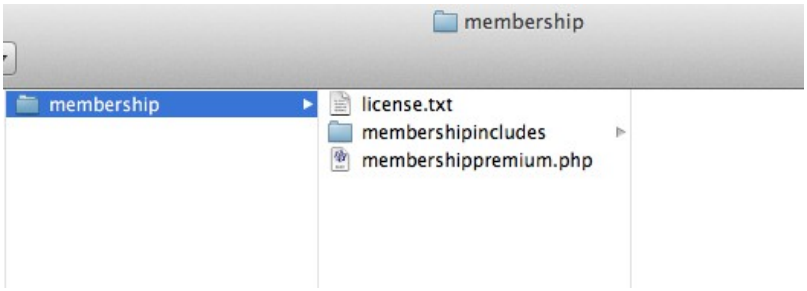
Table of Contents

Membership Premium 3.1.0 1
Installing 4
Wondering what FTP is? 4
Dashboard 6
Standard Membership Site 6
Dripped Content 7
Advanced 8
More On The Dashboard 9
News 10
Statistics 10
Membership Options – The Settings 11
General Tab 11
Stranger Settings 11
User Registration 11
Membership Pages 12
Registration Page 12
Registration Completed Page 15
Account Page 15
Subscription Page 16
Protected Content Page 17
Content Protection 18
Shortcode Protected Content 18
Admin Only Shortcodes 19
More Tag Default 19
BuddyPress Protected Content Message 21
Downloads / Media 22
Membership Admins 25
Extras 26
Payments Currency 27
Membership Renewal 27
Membership Upgrades 27
Membership Wizard 27
Simple Invite Codes 28
Advanced Settings 28
Payment Gateways 30
Authorize.net 31
Free Subscription 33
Paypal Express & Single Payment 33
2Checkout – 2CO 34
URL Groups 36
Pings 37
Access Levels 40
Rules 42
Types of Rules 43
Main Rules 44
Comments 44
More Tag 44
Pages 45
Posts 46
Menu 46
URL Groups 47

Content Rules....47
Downloads....47
Shortcodes....48
MarketPress....49
BuddyPress Rules....50
BuddyPress Pages....50
Private Messaging....50
Blogs....50
Group Creation....51
Groups....51
Administration Rules....52
Blog Creation....52
Main Menus....53
Sub Menus....53
Dashboard Widget....54
Plugins....54
Subscription Plans....56
Making A Subscription Plan....57
Communications....62
Constants....64
Common FAQ....65
Where are my Subscriptions?....65
Its not working? I see the content and shortcodes?....65
My FREE members register but cannot login. It says they are not “Active”....65
Can Membership installation control access to my Multisite Sites?....65
Why are my users no in the user panel, but show in the Network users area?....66

Installing

Once downloaded you unpack the files and upload them to your plugins folder using your favourite FTP program:



Upload them here:

/wp-content/plugins/

So it will look file this:

/wp-content/plugins/membership/ ← and all the files of course. :-)

Wondering what FTP is?

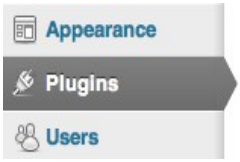
It stands for File Transfer Protocol, its basically a program which you use to upload or download files form your local computer to another computer (server, hosting, etc). Don't worry though if you have no clue what this is, WPMU Dev provide a handy tutorial right here:

http://premium.wpmudev.org/wpmu-manual/introduction-to-ftp-and-using-ftp-clients/

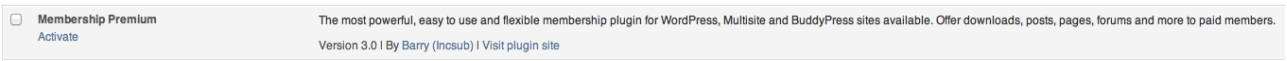
Now we have the files uploaded, we need to get it activated.

Admin → Plugins

/wp-admin/plugins.php



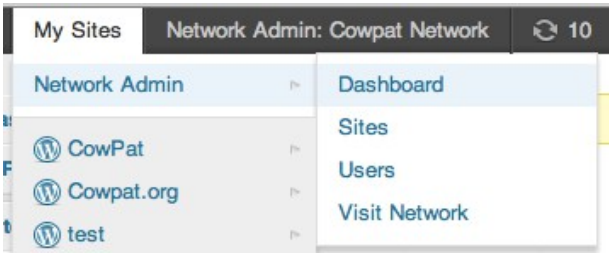
And click on **Activate**.


Membership Premium
Activate
The most powerful, easy to use and flexible membership plugin for WordPress, Multisite and BuddyPress sites available. Offer downloads, posts, pages, forums and more to paid members.
Version 3.0 | By Barry (Incsub) | Visit plugin site

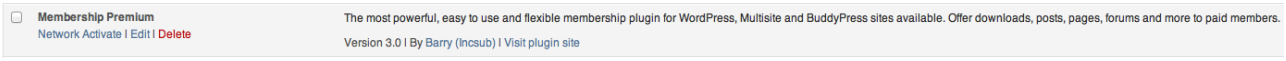
This plugin can also be Network Activated:

Admin → Network Admin → Plugins

/wp-admin/network/plugins.php



And click on **Network Activate**.

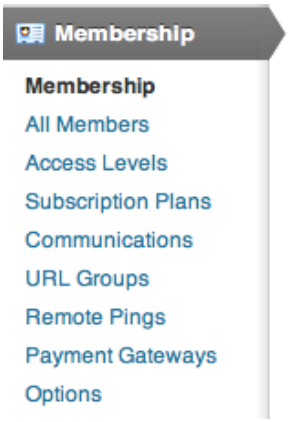

Membership Premium
Network Activate | Edit | Delete
The most powerful, easy to use and flexible membership plugin for WordPress, Multisite and BuddyPress sites available. Offer downloads, posts, pages, forums and more to paid members.
Version 3.0 | By Barry (Incsub) | Visit plugin site

There are no additional Network Admin settings for this plugin.... Yet. This will simply activate it on every website. However there are some constants documented later which can be used to run the membership plugin to take network control (i.e. not on a site by site basis). See Constants under the index table.

It's uploaded, it's activated and so now lets get it setup. Navigate over to the Membership plugin admin area.

Admin → Membership

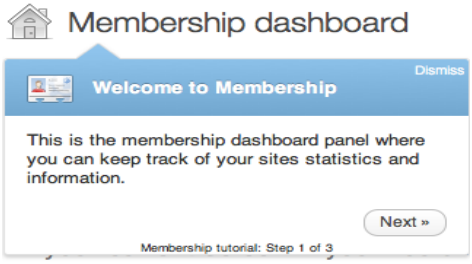
/wp-admin/admin.php?page=membership



Throughout the plugin you will see little images with an **"i**" in them, click on them for more information about the options.

Dashboard

Welcome to the new Membership Dashboard, I'm sure you noticed but if not then we now make use of the fantastic WordPress 3+ feature pointers.


Membership dashboard
Dismiss
Welcome to Membership
This is the membership dashboard panel where you can keep track of your sites statistics and information.
Next »
Membership tutorial: Step 1 of 3

Within this tutorial we won't be following the feature pointers, but please feel free to take advantage of those should you wish! :-)

Within the Membership Dashboard you have three options of how would like the plugin to function:

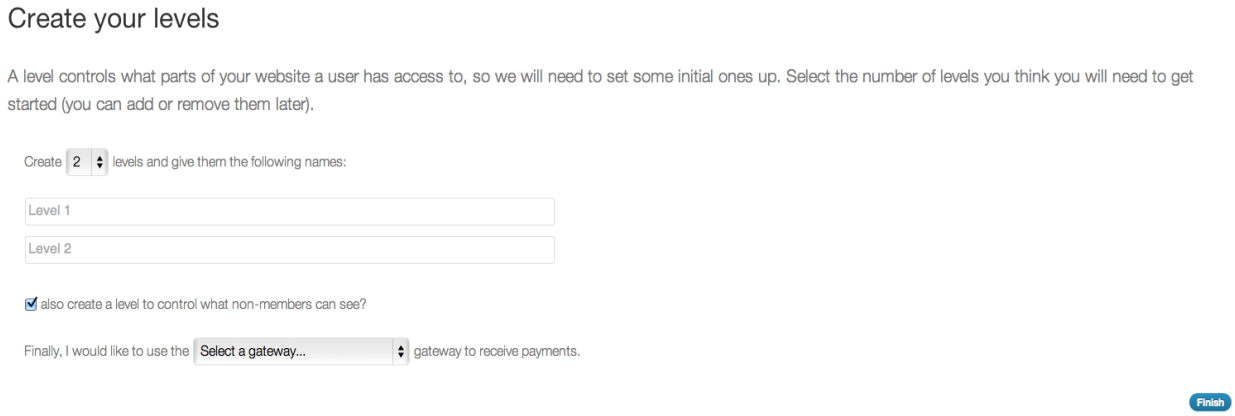
Standard Membership Site

Dripped Content Site

Advanced - This is much like the previous release of Membership, its more complex and may raise further questions for you. You are able to set both positive and negative rules together.

Standard Membership Site

If you selected the **Standard Membership Site** option and clicked **Next**, you will be presented with the following screen:


Create your levels
A level controls what parts of your website a user has access to, so we will need to set some initial ones up. Select the number of levels you think you will need to get started (you can add or remove them later).
Create 2 levels and give them the following names:
Level 1
Level 2
also create a level to control what non-members can see?
Finally, I would like to use the Select a gateway... gateway to receive payments.
Finish

The first option allows you to select between 1 and 99 levels to create in this Wizard.

If you select 50, then there will be 50 fields which you can name on this screen. Levels entered here will be made active by default in addition to creating subscriptions of the same name (Or different if you wish).

You can then also decide if there should be a level which non-members can see. Checking this option will create that level. Its a good idea to use this feature if some of your site should be open and visible to everyone, but you want to restrict your premium goodies.

And finally you then need to choose which gateway you want to use. Currently we have:

Authorize.net
Free Subscription
Paypal Express
Paypal Single Payment
2Checkout – 2CO

Choosing one will activate the gateway ready (we will cover gateways more later).

Want more gateways? Then request them in the forums, the more users support a gateway, the more likely it will be developed. :-)

Once done, just click the **Finish** button.

You will still want to edit everything you just created in order to have your own pricing, periods they are active for and what content can be accessed in addition to the gateway settings.

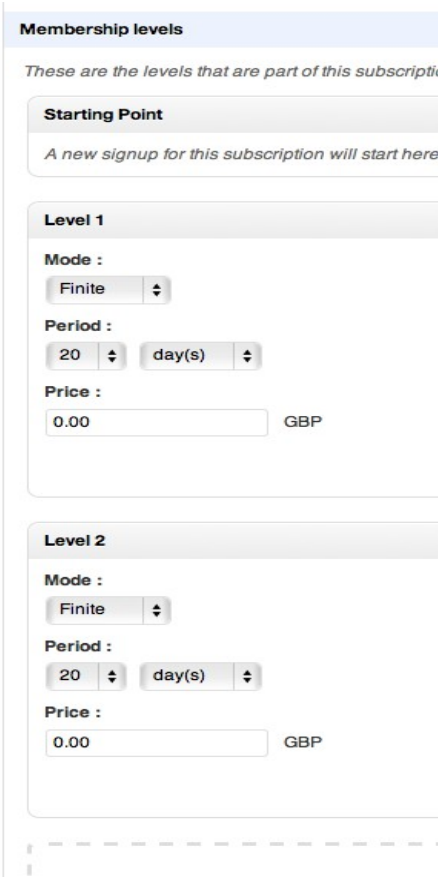
We will cover those further on..... If you haven't fallen asleep reading this manual thing! ha

Dripped Content

Some might ask what is drip content, well... Basically you could create multiple levels for one subscription. Each level could be active for a set period of time and so a user could signup and access your content for say 20 days, then on the 21st day they move to the next level thus getting more content. You could do this multiple times with different time frames and even fees.

You could use this as a reward... Signup for one membership, stay active for a month, a year or something else and then get moved to the next level which has access to an extra category for your loyal members or some super cool download content.

If you select the **Dripped Content** option, you will fill in the same form as shown for **Standard Membership Sites.** If you selected two levels, this time it will create one subscription titled “Dripped Subscription” with both levels added (whereas in **Standard Membership Sites** if you created two levels, there would also be two subscriptions).



Advanced

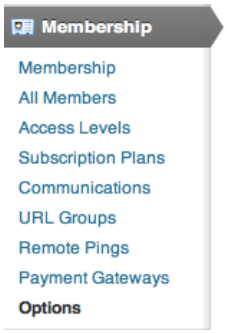
Selecting this option will remove the Wizard setup and leave you to handle it all yourself.

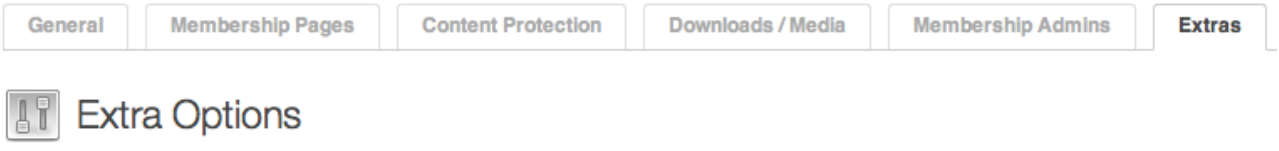
Did you select that but want to use the Wizard again for Standard or Dripped?

No worries, we have your back, just pop over to the options and re-enable it again.

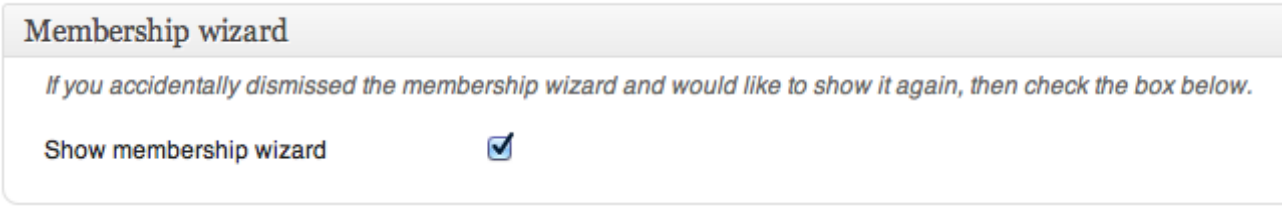
Admin → Membership → Options

/wp-admin/admin.php?page=membershipoptions





Click on the Extras Tab


Membership wizard
If you accidentally dismissed the membership wizard and would like to show it again, then check the box below.
Show membership wizard

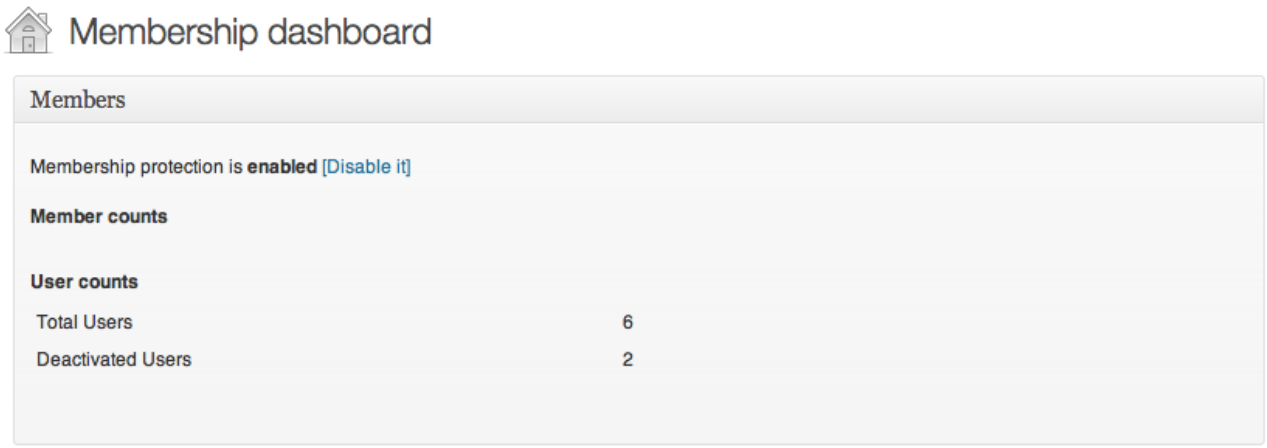
You can then choose to **Show Membership Wizard** again, just click on the save changes button and visit the membership dashboard, it will be there waiting for you.

More On The Dashboard

In the **Membership Dashboard** you can choose to disable the protection offered by Membership. If you do, then in the WP Admin bar you will see:

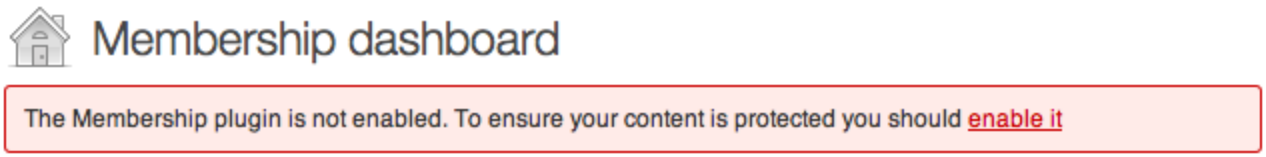
elcome to Membership

You can enable and disable here:



You can also see the **Total Users** and **Deactivated users** from here. **Deactivated Users** are those with no active subscription.

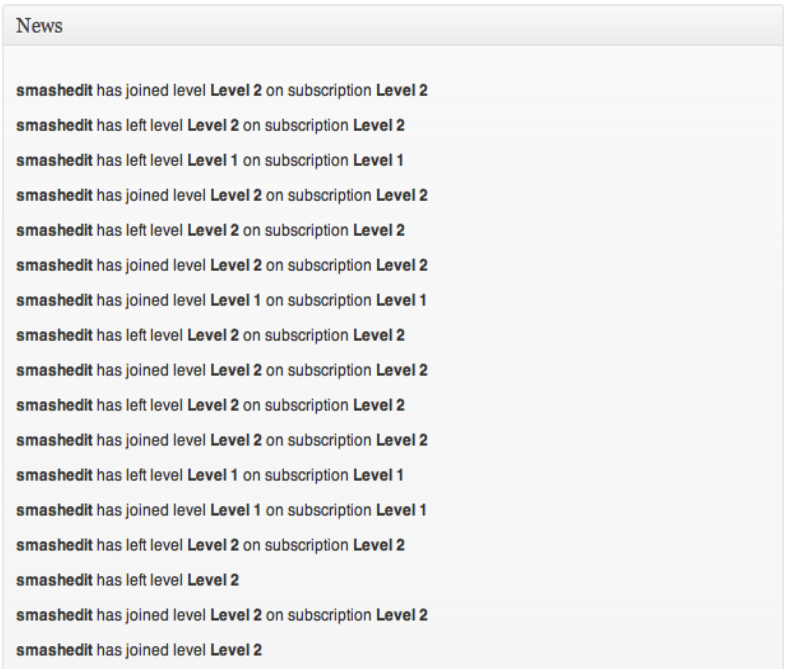
If the Membership protection is not enabled then you will see a red note in your admin area of WordPress.



We just wanted to make sure you knew your content is open to all! :-)

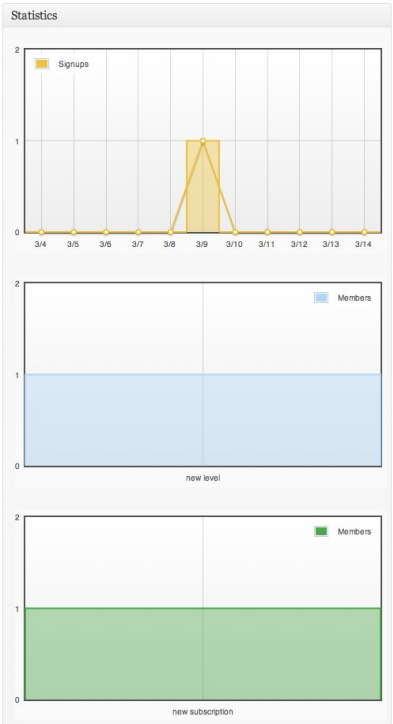
News

The news widget will let you know about member activity, when they upload download, leave a level, etc.



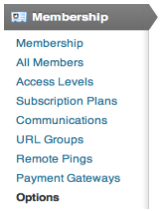
Statistics

In your Statistics widget you will be able to see all the date on your signups, level and new subscriptions. All presented with pretty graphics of course!

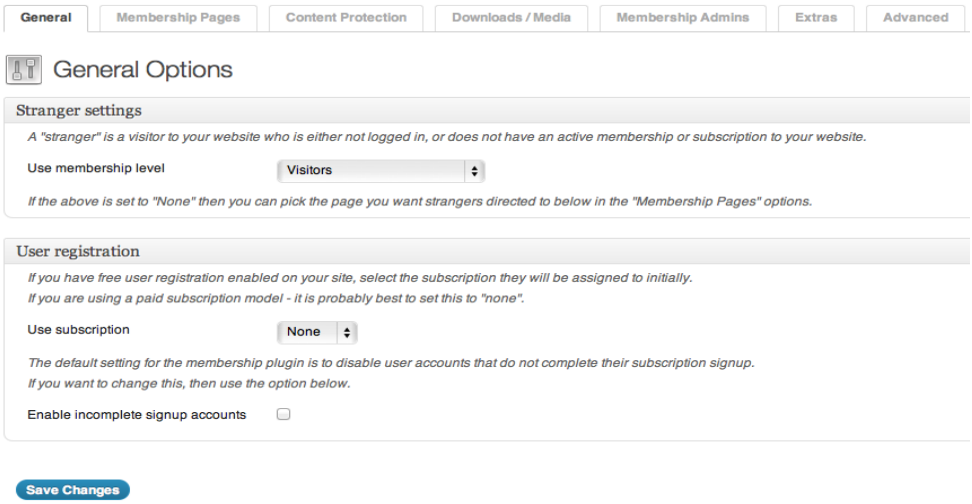


Membership Options – The Settings

Before we get to full on with levels, subscription and other features, lets just pop over to the option section and get our plugin setup.



General Tab


General
Membership Pages
Content Protection
Downloads / Media
Membership Admins
Extras
Advanced
General Options
Stranger settings
A "stranger" is a visitor to your website who is either not logged in, or does not have an active membership or subscription to your website.
Use membership level
Visitors
If the above is set to "None" then you can pick the page you want strangers directed to below in the "Membership Pages" options.
User registration
If you have free user registration enabled on your site, select the subscription they will be assigned to initially.
If you are using a paid subscription model - it is probably best to set this to "none".
Use subscription
None
The default setting for the membership plugin is to disable user accounts that do not complete their subscription signup.
If you want to change this, then use the option below.
Enable incomplete signup accounts
Save Changes

Stranger Settings

If you used the Wizard and selected "**Also create a level to control what non-members can see?**" then a default **Visitors** level will have been created and that will be the default option selected here. If there is no Stranger level then all of your content will be protected regardless which is probably not what you want because you would want to pop some blurb on there about why people need your critical subscription offerings.

It will then be down to each level to decide who has what access.

If you set this to none, then you can choose a page in the **Membership Pages** tab where users will be directed to if they do not have a subscription with you when viewing protected content.

As the description points out, this level will be used for visitors and members without a free or paid subscription to your site (free as in you give it them for free. Not free as in **Stranger Level** free). If you didn't insert a visitor level you can go create that and then come back here to finish the set up.

User Registration

You can choose to assign a default subscription when signing up, this of course would be a free option because your members would bypass the payment options.

Note: Because a user is automatically assigned a subscription then they would never be redirected to the welcome page. If you want them to see the welcome page, they would need to signup to the subscription like they would any with any other I.e select the subscription

they want and signup. So in that instance you would set this to *none*.

You might want to offer a free subscription, like “signup for 10 days free”, you can set which subscription they are assigned to by default. Most people will probably just create a stranger level as described previously in the **Stranger Settings**. But if you wanted to limit the time access then a free subscription is something to consider as well.

You can also choose to allow incomplete signups, so if your user registers but does not complete the signup process they would still be assigned an account to sign in with. If not they would be shown inactive.

Membership Pages

First and foremost keep if you use the **“Create Page”** button here, you can then go and add content to that page from the Page Admin area. If you edited the page for the subscription form, the form would appear below your content.

You can find the created pages here:

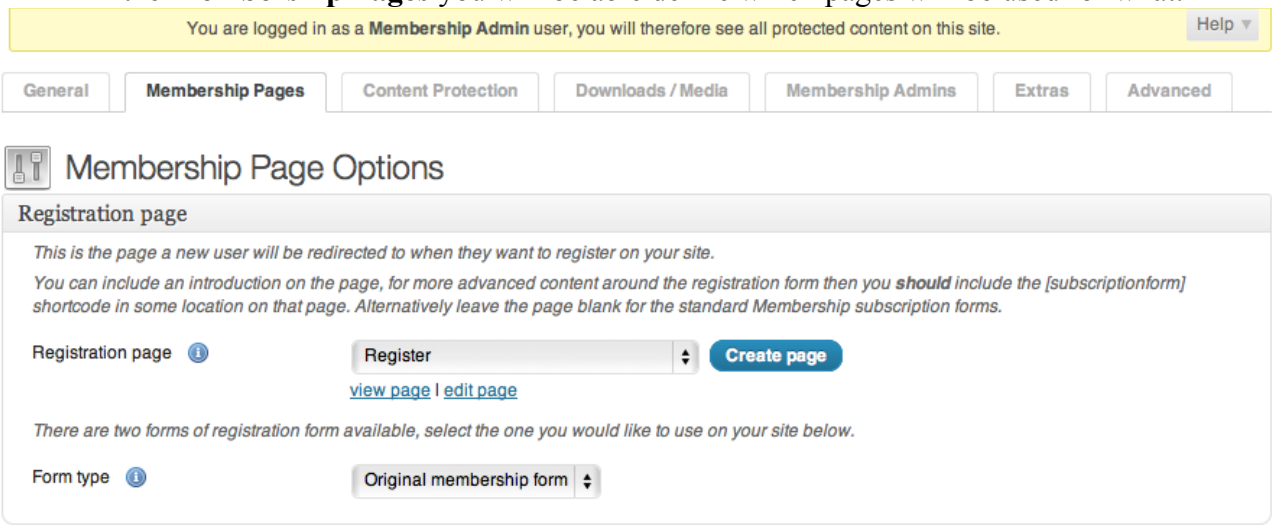
Admin → Pages

/wp-admin/edit.php?post_type=page

So back to the Membership Pages in options.

We have also now added a quick link to view the page and edit the page as you note in the next screenshot.

In the **Membership Pages** you will be able define which pages will be used for what.


You are logged in as a Membership Admin user, you will therefore see all protected content on this site.
Help
General
Membership Pages
Content Protection
Downloads / Media
Membership Admins
Extras
Advanced
Membership Page Options
Registration page
This is the page a new user will be redirected to when they want to register on your site.
You can include an introduction on the page, for more advanced content around the registration form then you should include the [subscriptionform] shortcode in some location on that page. Alternatively leave the page blank for the standard Membership subscription forms.
Registration page
Register
Create page
view page | edit page
There are two forms of registration form available, select the one you would like to use on your site below.
Form type
Original membership form

Registration Page

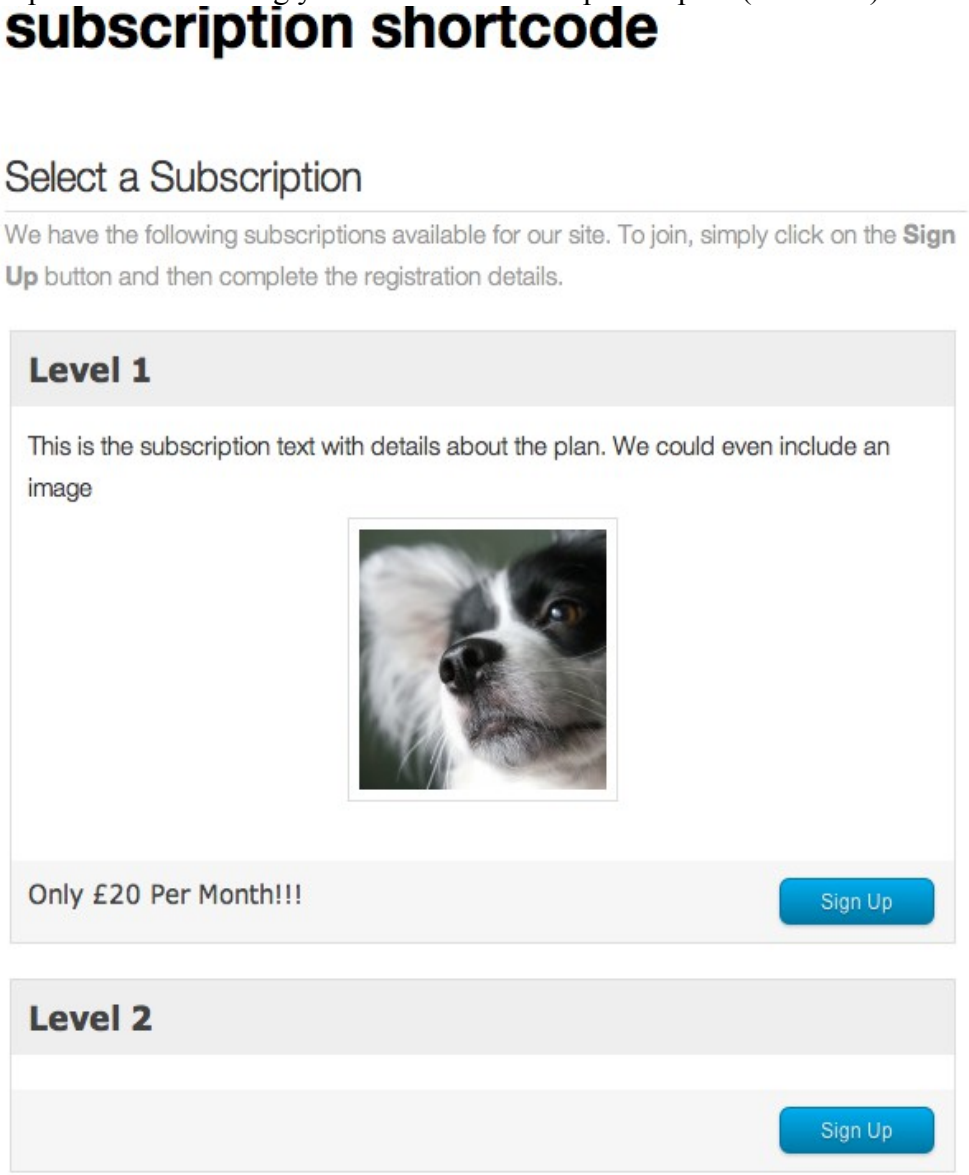
Decide which page in our WordPress site we will use for the registration page where users can grab a subscription. If the page does not exist in the drop down then click on the button **Create Page** button (Clicking this multiple times will create multiple pages).

If you want to add the subscription signup form to other pages, you can use the following shortcode:

[subscriptionform]

You can also use this shortcode to create your own signup page where you will include custom text and images, or what ever else you wish around the form. (not just above, but below as well)

Note: If you are using BuddyPress then you will have two signup forms here, you might not want to use the BuddyPress registration page if you are charging a premium or wanting your users to be on a specific plan (even free).

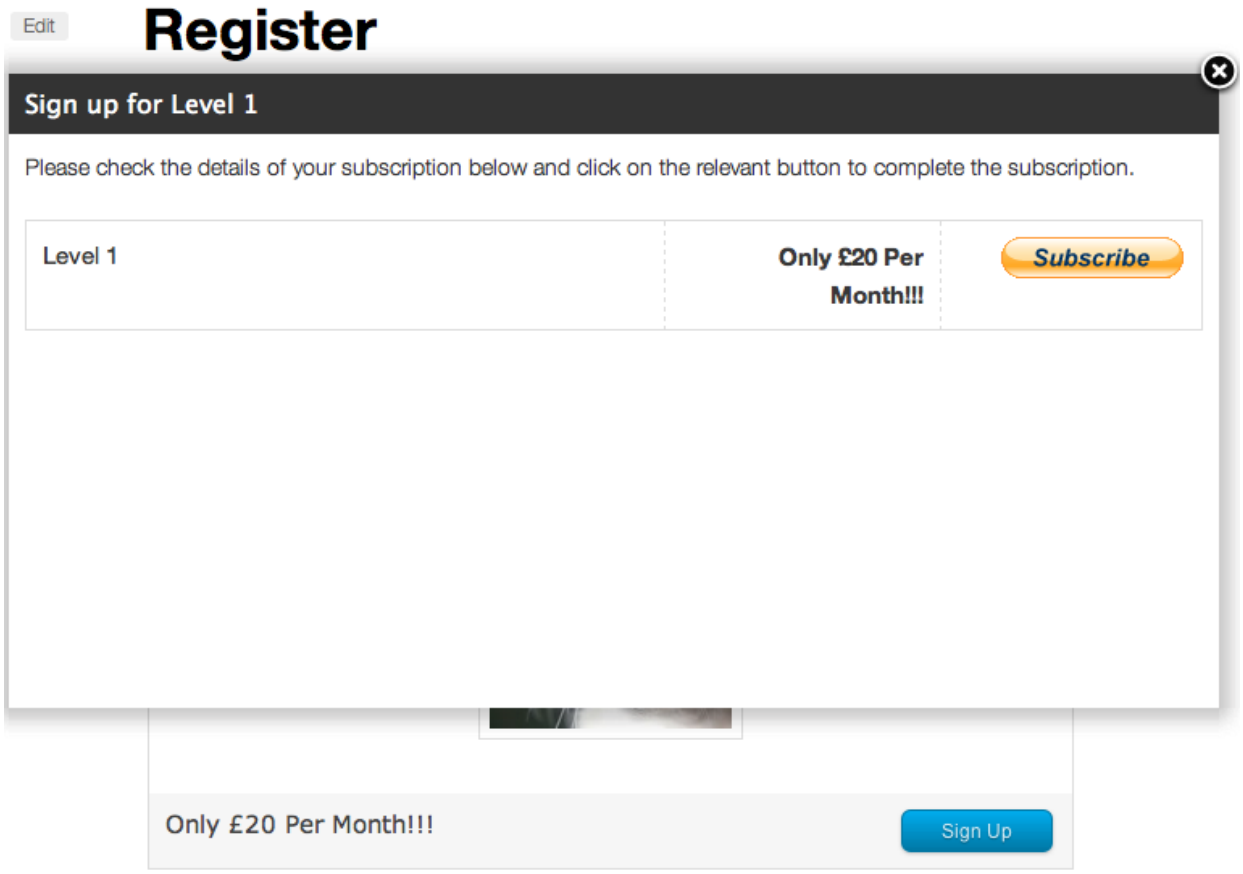

subscription shortcode
Select a Subscription
We have the following subscriptions available for our site. To join, simply click on the Sign Up button and then complete the registration details.
Level 1
This is the subscription text with details about the plan. We could even include an image
Only £20 Per Month!!!
Sign Up
Level 2
Sign Up

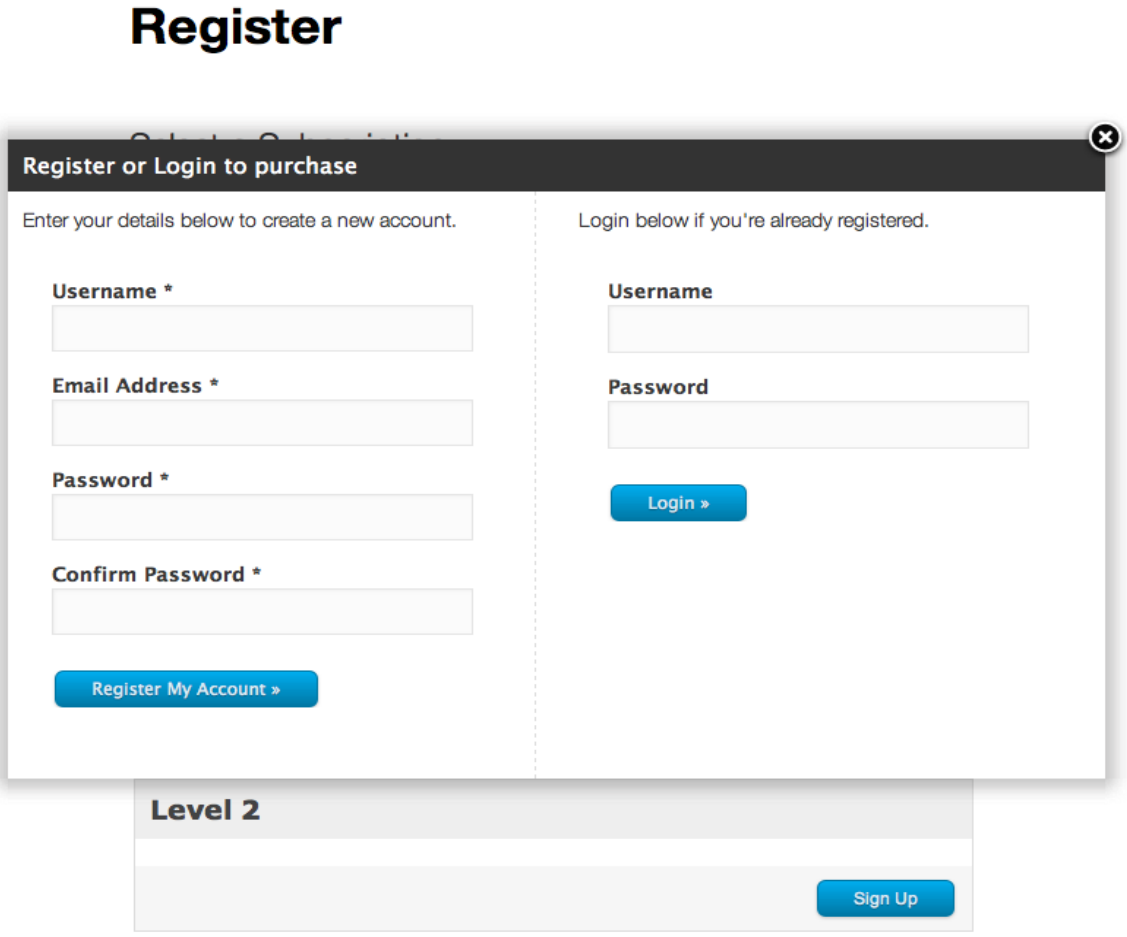
Form Type

There are two options here.

Original Membership Form – With this option when a user clicks the signup button they will be sent to another page to complete the process.

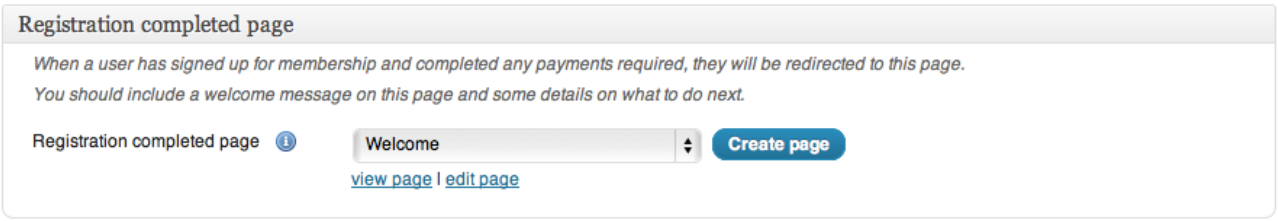
Popup Registration Form - This will give your users a nice in page pop up, like this:


Edit
Register
Sign up for Level 1
Please check the details of your subscription below and click on the relevant button to complete the subscription.
Level 1
Only £20 Per Month!!!
Subscribe
Only £20 Per Month!!!
Sign Up


Register
Register or Login to purchase
Enter your details below to create a new account.
Username *
Email Address *
Password *
Confirm Password *
Register My Account »
Login below if you're already registered.
Username
Password
Login »
Level 2
Sign Up

Registration Completed Page

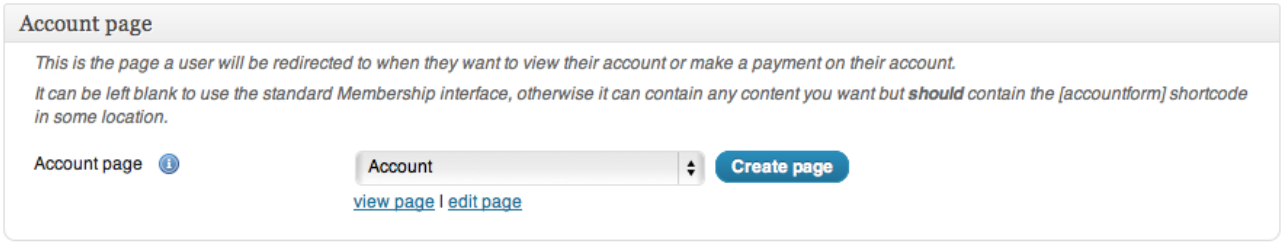
Really as it states, this is the page your users will see once they signup successfully and make any payments due. Create the page here and you can go edit it to put anything you wish on there.


Registration completed page
When a user has signed up for membership and completed any payments required, they will be redirected to this page.
You should include a welcome message on this page and some details on what to do next.
Registration completed page
Welcome
Create page
view page | edit page

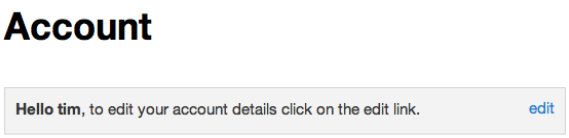
If you want custom messages per subscription level then you can use multiple Membership Shortcodes on that page then members will see content relevant to their level.

Account Page

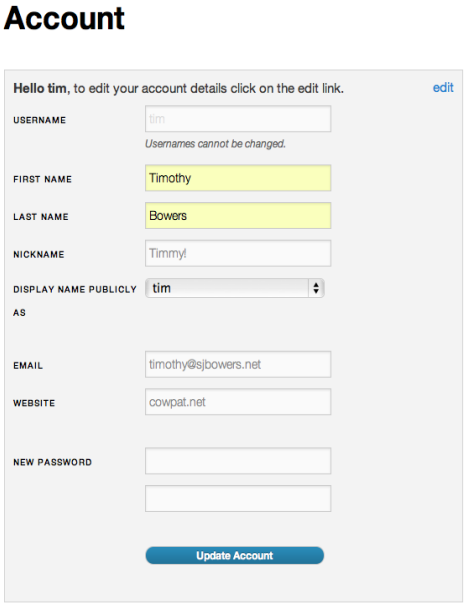
The Account Page is where you users can go and edit their account details.


Account page
This is the page a user will be redirected to when they want to view their account or make a payment on their account.
It can be left blank to use the standard Membership interface, otherwise it can contain any content you want but should contain the [accountform] shortcode in some location.
Account page
Account
Create page
view page | edit page

This is how it will look from the front end:



If your users click edit, they can then edit their account with the following form:

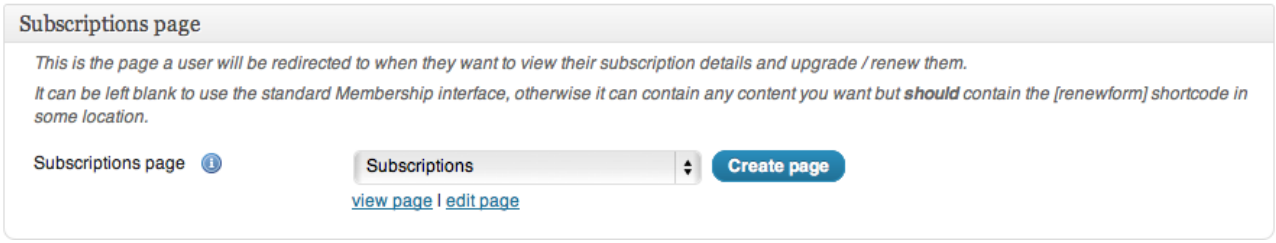


No need for the WordPress admin area this way! :-)

If you wanted to create your own custom page with text and images you can also use our shortcode:

[accountform]

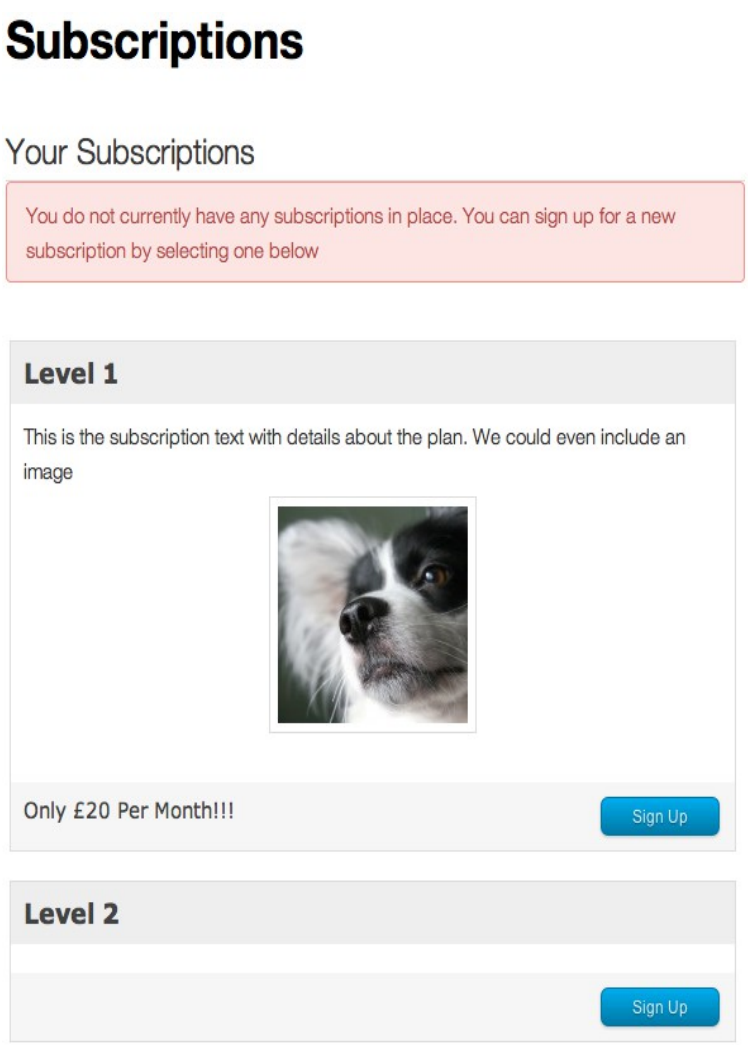
Subscription Page

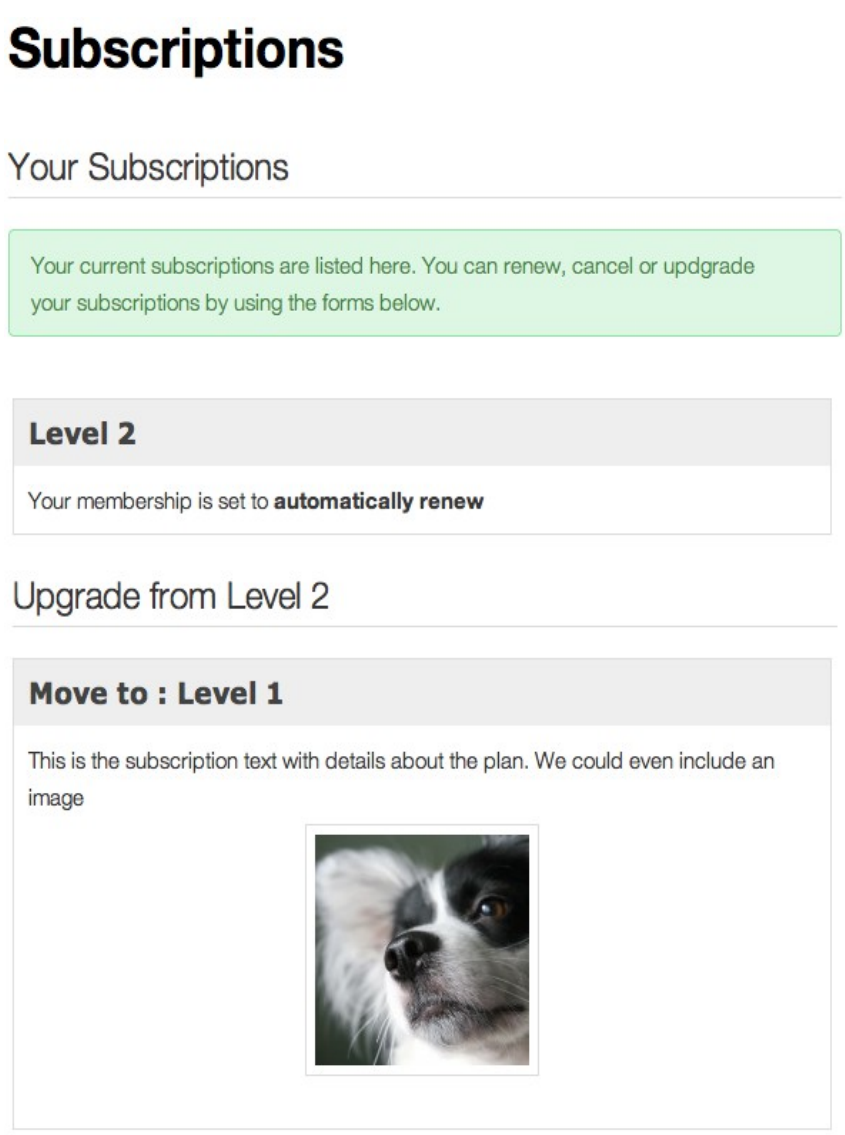

Subscriptions page
This is the page a user will be redirected to when they want to view their subscription details and upgrade / renew them.
It can be left blank to use the standard Membership interface, otherwise it can contain any content you want but should contain the [renewform] shortcode in some location.
Subscriptions page
Subscriptions
Create page
view page | edit page

This is where your users will be able to see their current subscription, renew and upgrade

If you wanted to create your own page with custom content, you can use the following shortcode:

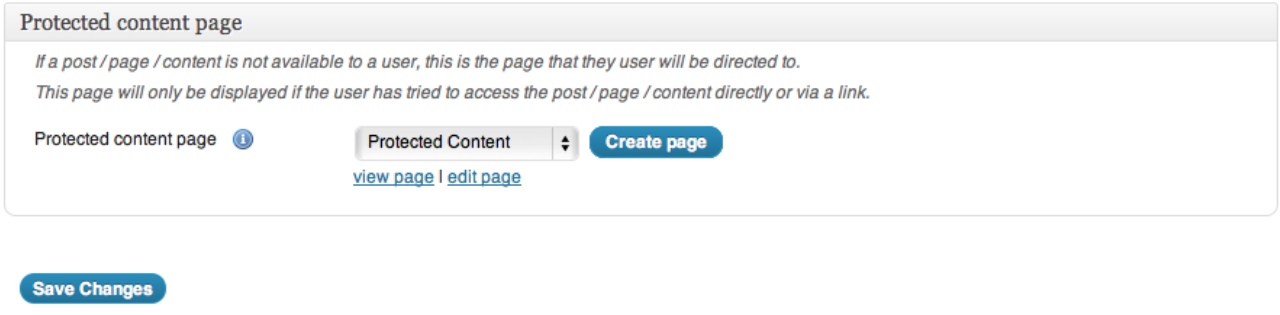
[renewform]


Subscriptions
Your Subscriptions
You do not currently have any subscriptions in place. You can sign up for a new subscription by selecting one below
Level 1
This is the subscription text with details about the plan. We could even include an image
Only £20 Per Month!!!
Sign Up
Level 2
Sign Up


Subscriptions
Your Subscriptions
Your current subscriptions are listed here. You can renew, cancel or updgrade your subscriptions by using the forms below.
Level 2
Your membership is set to automatically renew
Upgrade from Level 2
Move to : Level 1
This is the subscription text with details about the plan. We could even include an image

Protected Content Page

When you protect a post or page, this is the content a user will be directed to if they do not have a subscription with access. That will prevent the user without a subscription accessing the content direct.


Protected content page
If a post / page / content is not available to a user, this is the page that they user will be directed to.
This page will only be displayed if the user has tried to access the post / page / content directly or via a link.
Protected content page
Protected Content
Create page
view page | edit page
Save Changes

You can edit this page direct, make a huge splash there with some flashy graphics or promotional text promoting why people should upgrade to a snazzy subscription from your website. Even link them to your signup page.

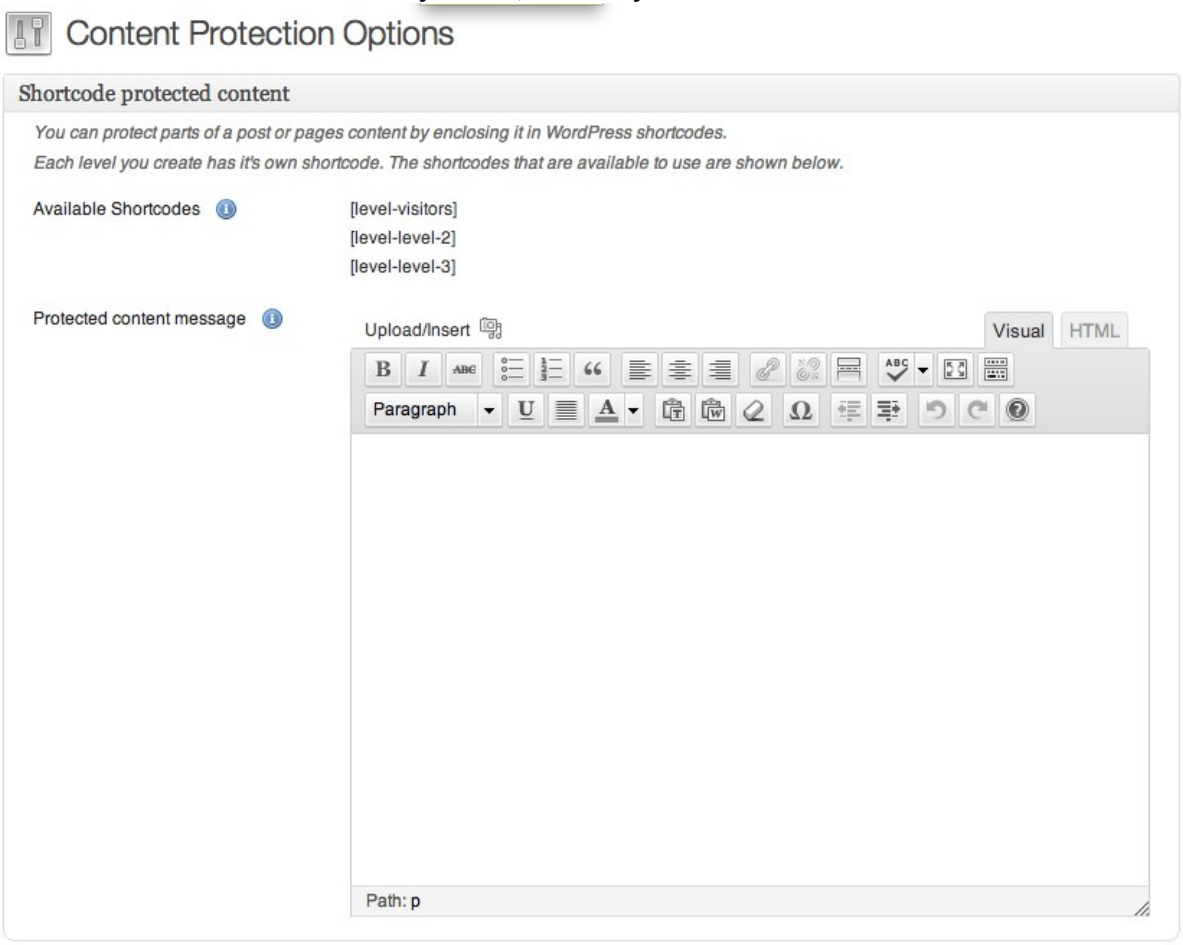
Thats is it for the **Membership Pages** tab, just be sure to click on the **Save Changes** button and your done.

Content Protection

If you are looking for other ways to protect your content and not just by post or page, then this is the place to be. You can protect any content with shortcodes, add custom shortcodes for plugins which do not appear within the levels creation page and any content after the WordPress More tag.

Shortcode Protected Content

I used the Wizard to create my levels, so here you will see that.



Available Shortcodes

[level-visitors]
[level-level-2]
[level-level-3]

So now when making posts you can use those shortcodes, just don't forget to close them as well. Here is how its done:

[level-level-2]Protect my content for level 2[/level-level-2]

Note the last **[/level-level-2]** it has a backslash in there **"/"** thats telling WordPress its

the end of the shortcode and do whatever with everything between. So with the Membership plugin that would be hide the content unless a given user has the right access.

Your created Access Levels will show here (their shotcodes).

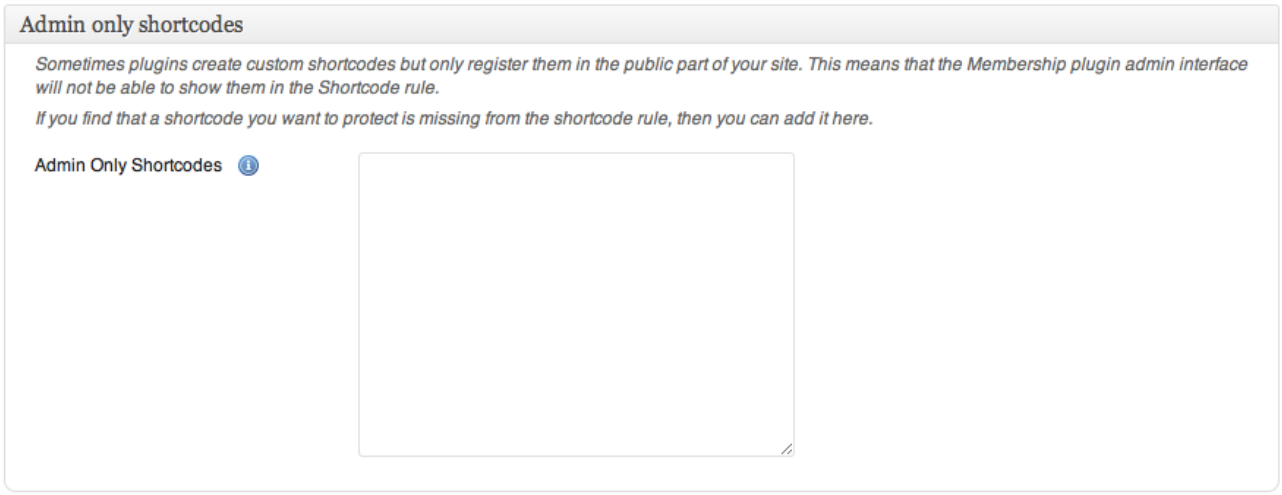
Protected Content Message

If a user does not have the right access then we can display a message for them. This could be a cool graphic or set of graphics. Some sales blurb or anything we like, its your choice. Its a great way to up sell on your website and get new subscribers.

You see you could make downloads on the page protected. You could use it to hide coupons for your MarketPress shop, different levels get different discounts. Or anything else you like.

Admin Only Shortcodes

Lets imagine you have a plugin which uses a shortcode to display some kind of content, however whilst creating your levels you can't see that shortcode..... Well add it here, and now you will. This will ensure your content is protected.


Admin only shortcodes
Sometimes plugins create custom shortcodes but only register them in the public part of your site. This means that the Membership plugin admin interface will not be able to show them in the Shortcode rule.
If you find that a shortcode you want to protect is missing from the shortcode rule, then you can add it here.
Admin Only Shortcodes

More Tag Default

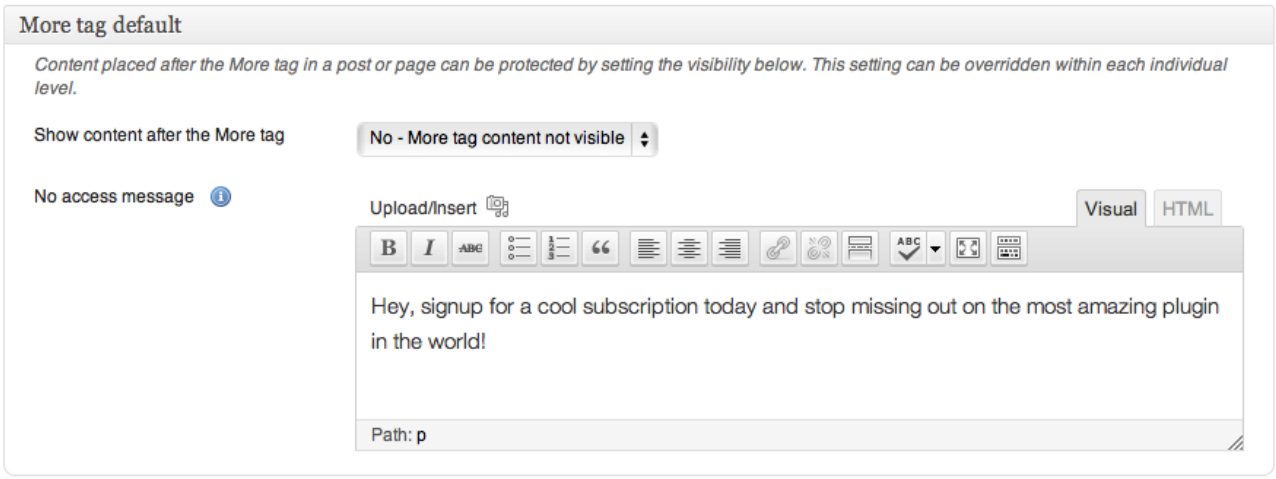
If you did not know already, WordPress has this cool feature that when you are writing a post or page you can include a simple more tag and then anything after the tag requires you to click read more or what ever is customised on your theme. Well we have this incredibly clever feature whereby you can use that tag to protect your content.

So why is this useful you may ask?

Simple, you could create a post or page and stick in the first paragraph or two or more if you like, this could be the most epic teaser anyone has ever read. Then protect the rest of the content. This is good for Google and other search engines, your content brings in readers and those readers will take in your catchy, short yet tantalising text then want more!!!

Who can resists a great teaser?

Subscription sold!! Cha-Ching!! You'll be laughing all the way to the bank!


More tag default
Content placed after the More tag in a post or page can be protected by setting the visibility below. This setting can be overridden within each individual level.
Show content after the More tag
No - More tag content not visible
No access message
Upload/Insert
Visual
HTML
Hey, signup for a cool subscription today and stop missing out on the most amazing plugin in the world!
Path: p

Show Content After The More Tag - There are two options here

No – More tag content not visible: This will ensure anything after the more tag is not visible unless they have a subscription.

Yes – More tag content is visible: This will show all content in the more tag to the world. You would choose this option if you wanted more control. You might not want users on your level one subscription to see content after the more tag, but you might make it available to level two.

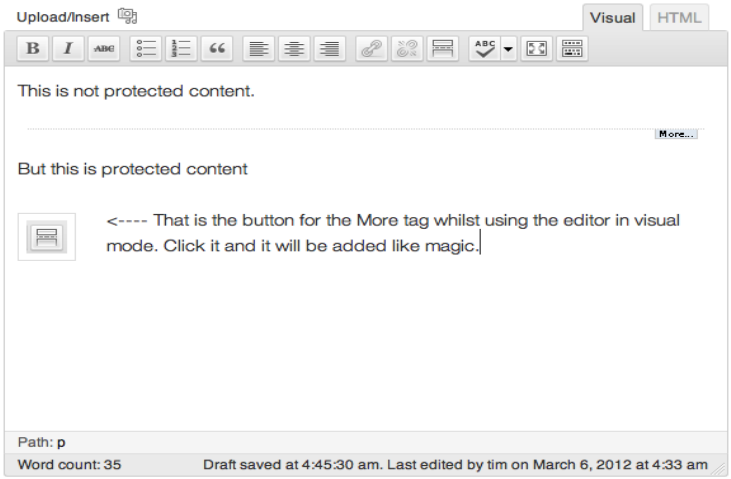
Or you might just not want it protecting at all, this allows you to continue to use the more tag as designed by WordPress.

Oh, and that more tag looks like this:

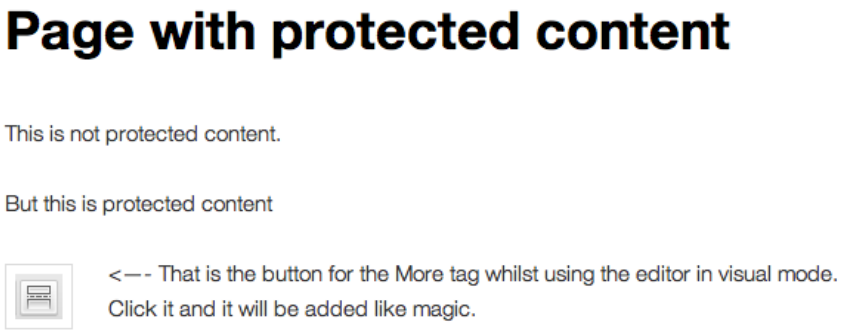
<!-- More -->

In HTML mode of your post/page editor you will see a button titled **more**, just click that to add the tag.

And in the visual editor its a graphical button as you see in the next screenshot:


Upload/Insert
Visual
HTML
This is not protected content.
More...
But this is protected content
<---- That is the button for the More tag whilst using the editor in visual mode. Click it and it will be added like magic.
Path: p
Word count: 35
Draft saved at 4:45:30 am. Last edited by tim on March 6, 2012 at 4:33 am

So on the page here is how it looks to the end user when not protected:

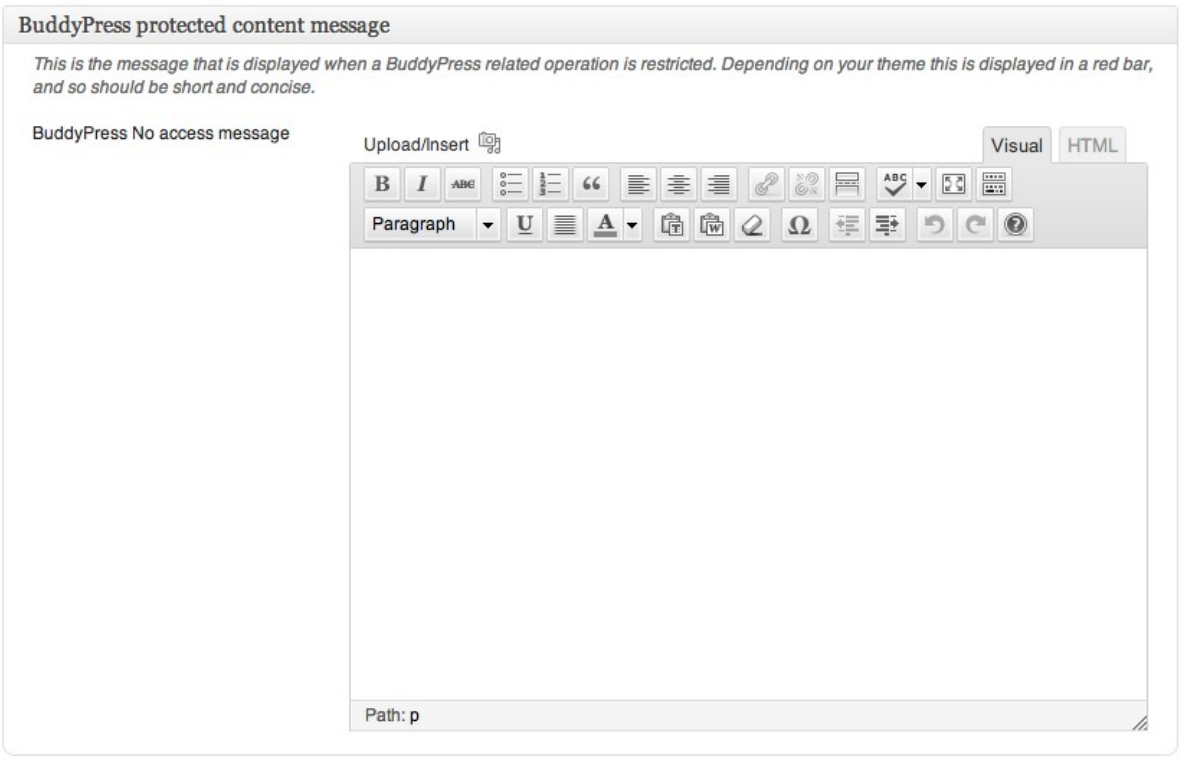

Page with protected content
This is not protected content.
But this is protected content
<— - That is the button for the More tag whilst using the editor in visual mode. Click it and it will be added like magic.

And this is how it looks when the more tag is protected:

Page with protected content
This is not protected content.
Hey, signup for a cool subscription today and stop missing out on the most amazing plugin in the world!

BuddyPress Protected Content Message

Note: This only appears if you have BuddyPress installed.


BuddyPress protected content message
This is the message that is displayed when a BuddyPress related operation is restricted. Depending on your theme this is displayed in a red bar, and so should be short and concise.
BuddyPress No access message
Upload/Insert
Visual
HTML
Paragraph
Path: p

This is the message displayed when someone attempts to access one of the cool BuddyPress items which they don't have access to and which you are protecting.

Freakin awesome, eh!

So lets click on the **Save Changes** button because we are done here!

Downloads / Media

With the Membership plugin we also have this fantastic feature to protect our media, we can even mask that url to prevent direct access. This is great for downloads like PDF magazines, MP3 files, Avi files, code, perhaps your own plugins and themes, well anything you want to protect which is downloadable.

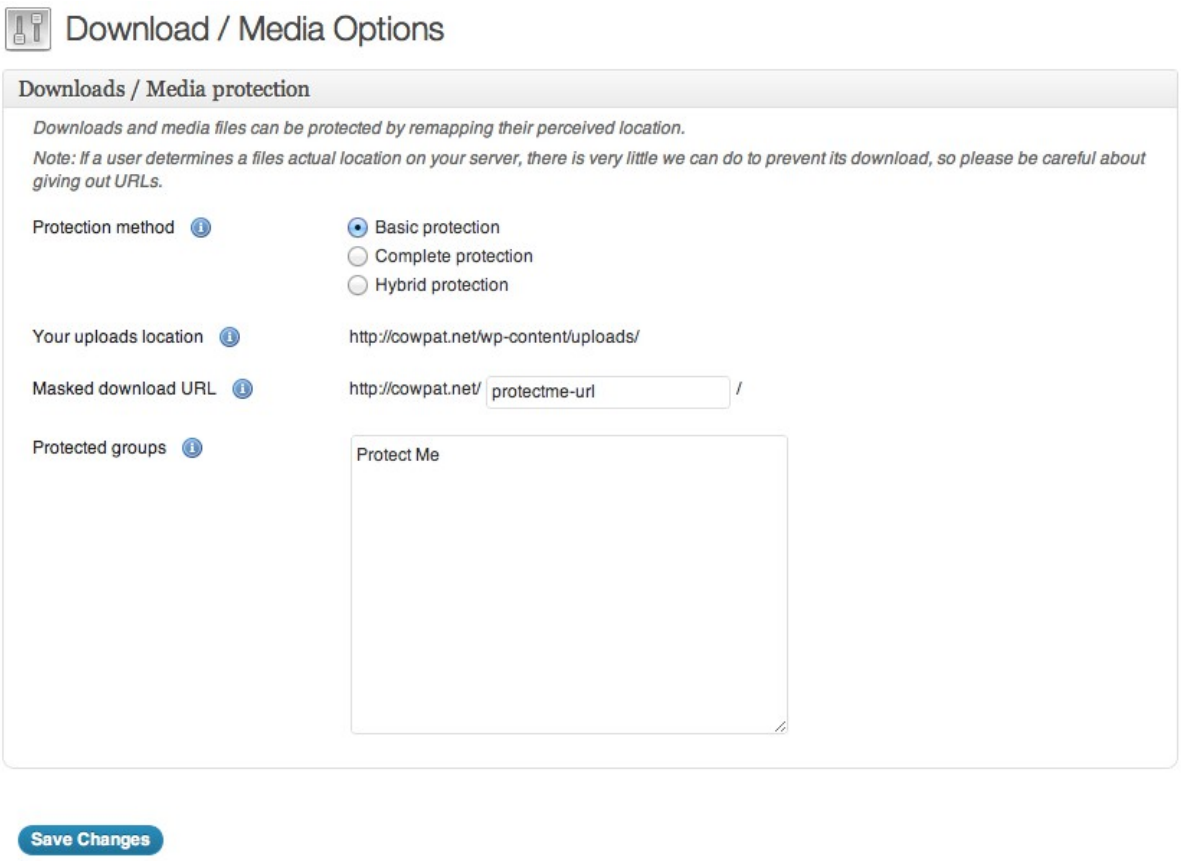
Protection Method – This is a new feature in 3.1 and allows you to select different methods of protection for your media. Some servers (nginx) have issues with how media were protected previously so with this release it should remedy that.

The method of protection can be changed depending on your needs.

Basic - Masks your media directory but leaves any filenames the same.

Complete - Masks the media directory and changes the image filename as well.

Hybrid – This is for use if you are using a host or server that has a problem with the system (such as some installs of nginx).

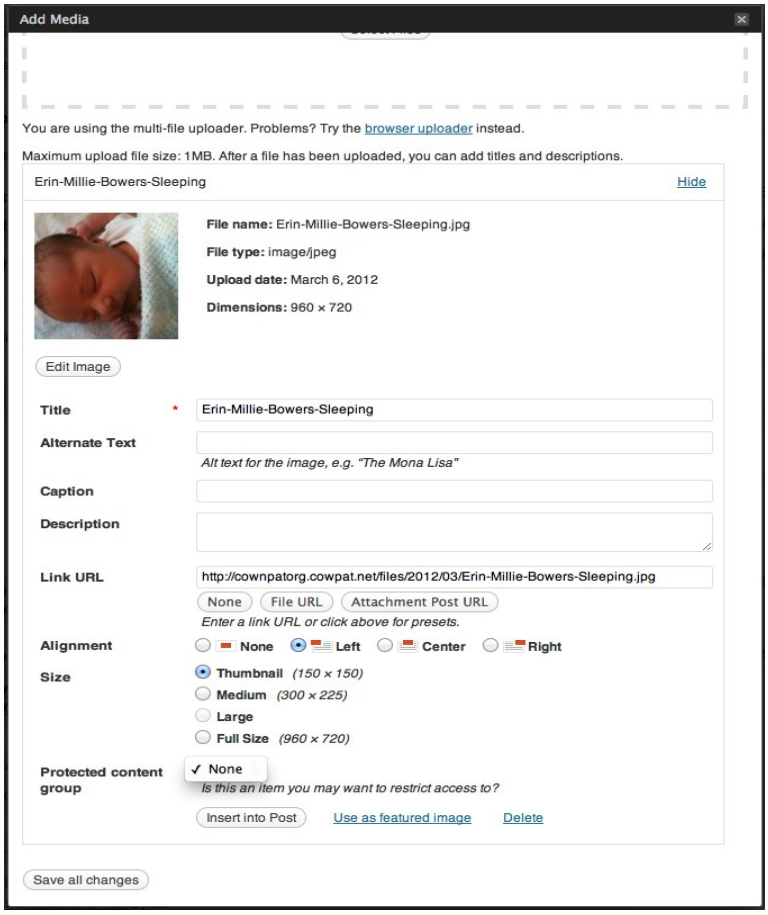

Download / Media Options
Downloads / Media protection
Downloads and media files can be protected by remapping their perceived location.
Note: If a user determines a files actual location on your server, there is very little we can do to prevent its download, so please be careful about giving out URLs.
Protection method
Basic protection
Complete protection
Hybrid protection
Your uploads location
http://cowpat.net/wp-content/uploads/
Masked download URL
http://cowpat.net/
protectme-url
/
Protected groups
Protect Me
Save Changes

Masked Download URL – is the download link your users will see, its not the direct link of course because we don't want them having that. In this field we could add anything random, I threw in some random letters but please add anything you like, maybe just "downloads".

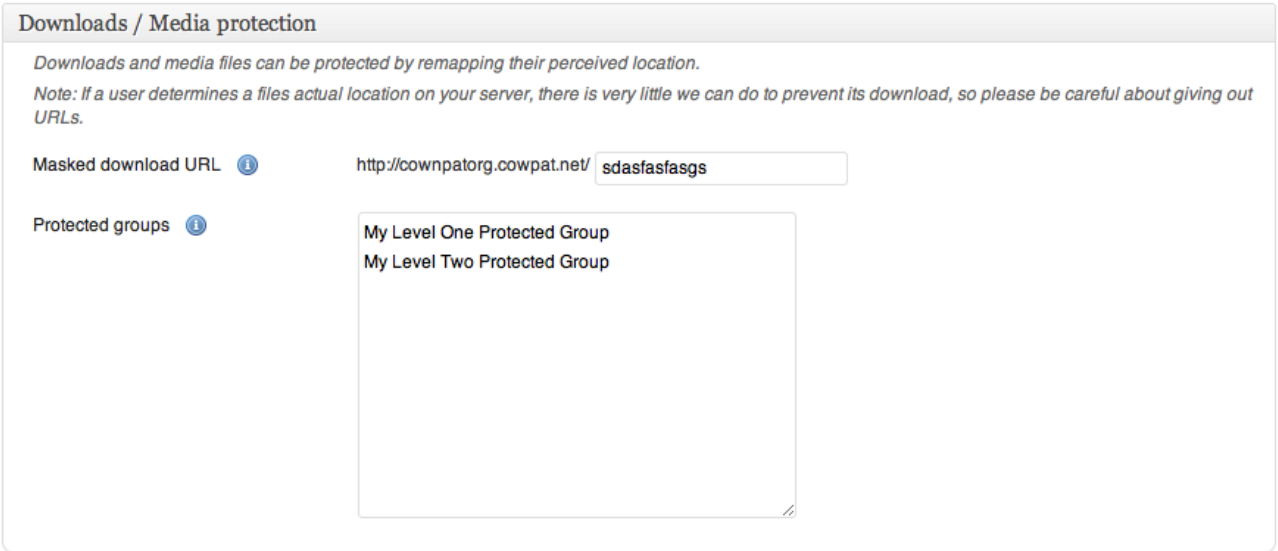
Anyone trying to access the content through this url is processed by the plugin and so if they don't have a subscription they will rightly be forwarded to the **Protected content page** we set up earlier in this plugin.

Protected Groups – We can create multiple groups here, and name them anything we like. They will appear within the media section when uploading and inserting media.

Here is an example:



See the **Protected Content Group** option, it currently says none, because I didn't set any up. So lets set up two now.


Downloads / Media protection
Downloads and media files can be protected by remapping their perceived location.
Note: If a user determines a files actual location on your server, there is very little we can do to prevent its download, so please be careful about giving out URLs.
Masked download URL
http://cownpatorg.cowpat.net/
sdasfasfasgs
Protected groups
My Level One Protected Group
My Level Two Protected Group

And click on the **Save Changes** button.
Rather than upload another image or some other media to demo, we can pop on over to the Media section of your WordPress Site:

We will edit the image I just uploaded:

And now under the **Protected Content Group** we can see those groups we just set up!

You might be asking how this works and that will become clear when you create/edit your levels later in this tutorial.

See Content Rules → Downloads in the level editor.

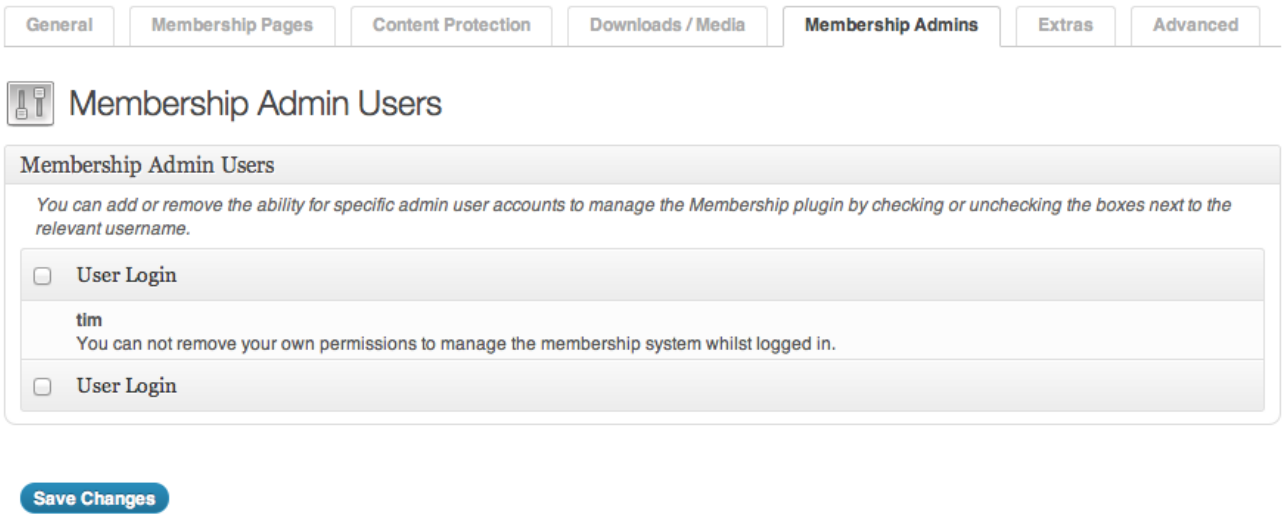
Keep in mind though, you must never give out direct links to your media downloads. I refer to the physical folder path i.e.

/wp-content/uploads/.....

Anyone with the direct url can bypass our download protection. You must only use Masked Download URL if you wish to ensure your content remains protected from the prying eyes of non subscribers.

Membership Admins

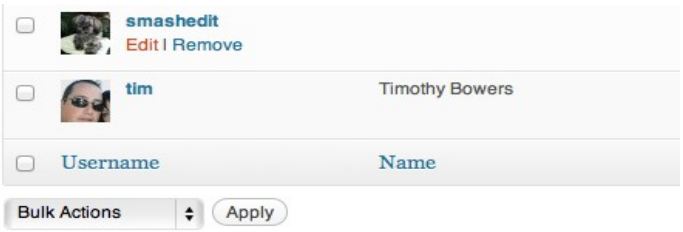
Got some staff and need to give control, you can do that from this tab. There is however a prerequisite and that is only current administrators of your site will show here.


General
Membership Pages
Content Protection
Downloads / Media
Membership Admins
Extras
Advanced
Membership Admin Users
Membership Admin Users
You can add or remove the ability for specific admin user accounts to manage the Membership plugin by checking or unchecking the boxes next to the relevant username.
User Login
tim
You can not remove your own permissions to manage the membership system whilst logged in.
User Login
Save Changes

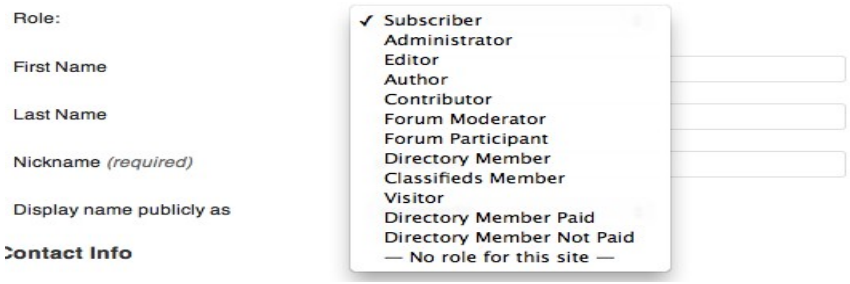
You can use the WordPress **Users** editor to give your staff admin control. Once they are an administrator you can then make them a Membership admin as well.

Admin → Users → All Users

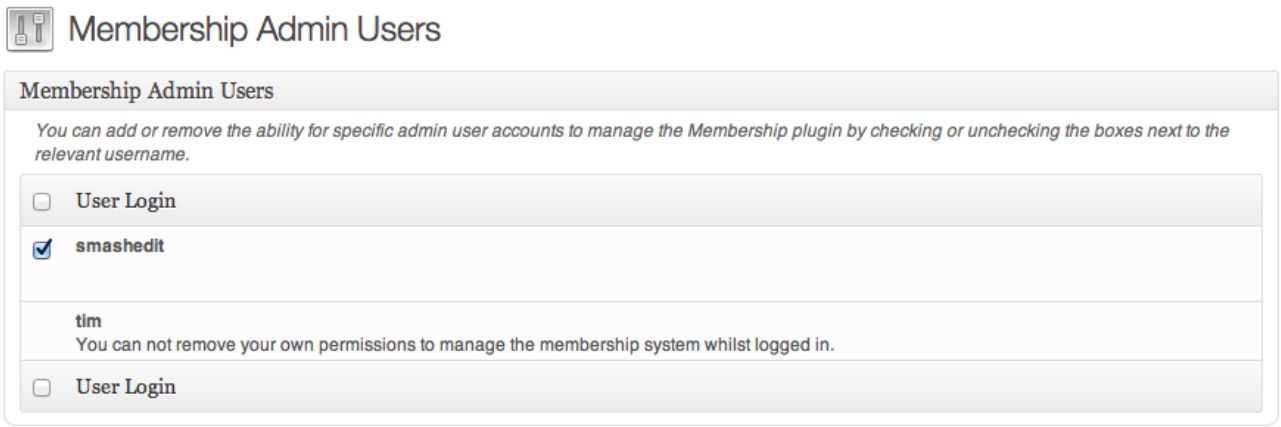
Select the user you wish to edit.



Then down the bottom of the page whilst editing a user you will find the option to add them as an administrator:



And then in your **Membership Admins** tab on the options page, you will have your new admin. You can check and uncheck his level and **Save Changes** to add or remove the **Membership** admin access.


Membership Admin Users
Membership Admin Users
You can add or remove the ability for specific admin user accounts to manage the Membership plugin by checking or unchecking the boxes next to the relevant username.
User Login
smashedit
tim
You can not remove your own permissions to manage the membership system whilst logged in.
User Login

Extras

All the extra settings hide in here, helps keep the admin area nice and tidy.

Payments Currency

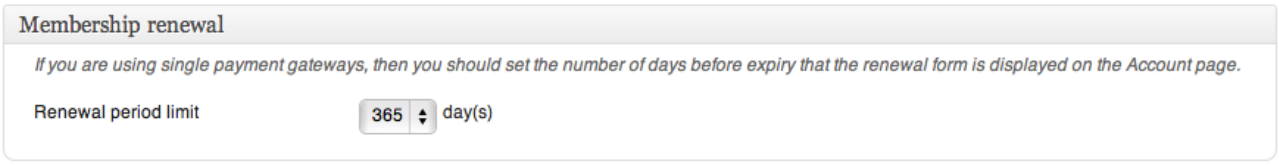
The first option is the currency we wish to accept.

I personally selected GBP because I hail from Great Britain and we have the Pound hence GBP. :-)

Select which ever is relevant to you.

Membership Renewal

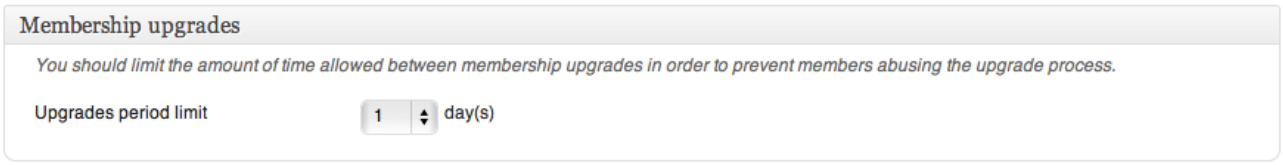
When using single payment gateways you can specify how far in advance a member can renew.


Membership renewal
If you are using single payment gateways, then you should set the number of days before expiry that the renewal form is displayed on the Account page.
Renewal period limit
365
day(s)

You can set between 1 and 365 days. I have set mine to 365 so my members could renew at any point throughout the year.

Membership Upgrades

You can set the minimum time allowed between upgrades for your users.


Membership upgrades
You should limit the amount of time allowed between membership upgrades in order to prevent members abusing the upgrade process.
Upgrades period limit
1
day(s)

This can also be set between 1 and 365 days. I don't mind my members upgrading frequently and so I set mine to 1.

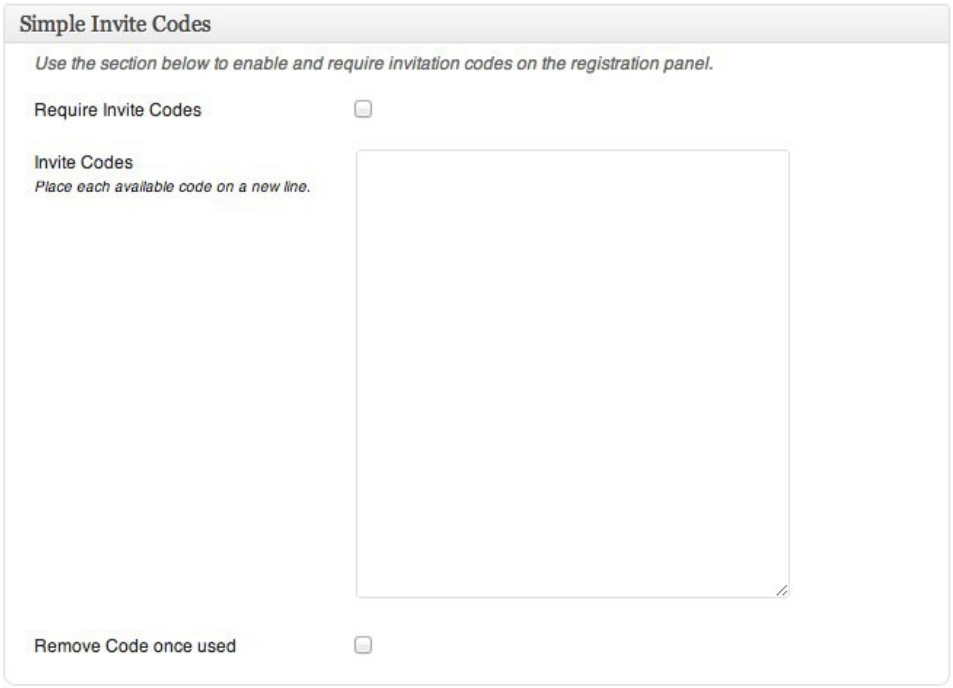
Membership Wizard

Remember when we first started getting this setup, we had the Wizard which walked us through setting up some default levels and the gateway. Well if you dismissed that and want it back, you can simple check the **Show Membership Wizard** and it will be back again.

Membership wizard
If you accidentally dismissed the membership wizard and would like to show it again, then check the box below.
Show membership wizard

Simple Invite Codes

You can even restrict access to your sites by requiring those signing up to have an Invite Code.


Simple Invite Codes
Use the section below to enable and require invitation codes on the registration panel.
Require Invite Codes
Invite Codes
Place each available code on a new line.
Remove Code once used

Three options there, real simple of course.

Require Invite Codes – When checked anyone signing up will require a shortcode otherwise they will not be able to register.

Invite Codes – Enter your codes here, each code must be on its own line.

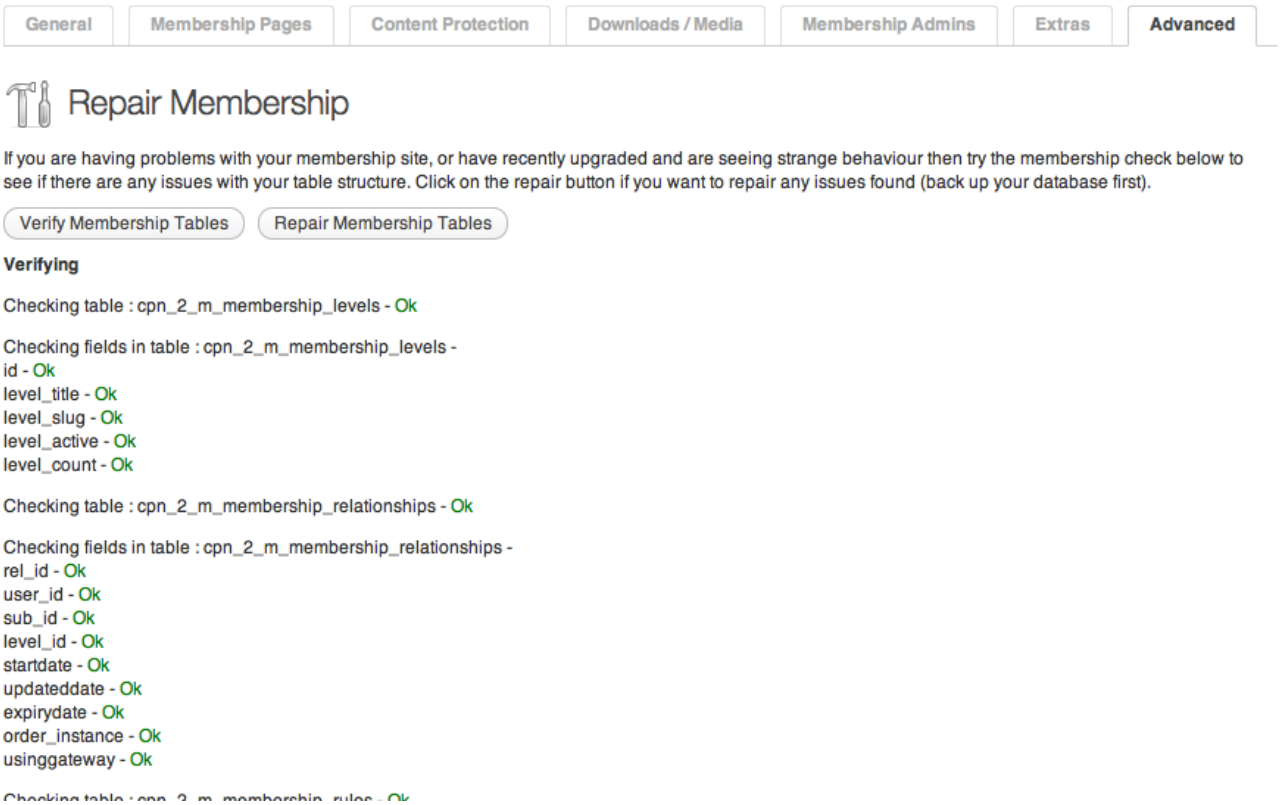
Remove Code Once Used – Pretty self explanatory but this will make your codes a one time use only so once a new member signs up with the code it will be removed.

And thats another tab down, one more to go. Just click on the **Save Changes** button and off we go!

Advanced Settings

This one will be short and sweet, you most likely will never use it but here we are anyway. :-)

If you ever notice an issue with your setup using our Membership plugin then pop in here, you can **Verify Membership Tables** and you can also use the **Repair Membership Tables** button to help remedy any issues you might get.


General
Membership Pages
Content Protection
Downloads / Media
Membership Admins
Extras
Advanced
Repair Membership
If you are having problems with your membership site, or have recently upgraded and are seeing strange behaviour then try the membership check below to see if there are any issues with your table structure. Click on the repair button if you want to repair any issues found (back up your database first).
Verify Membership Tables
Repair Membership Tables
Verifying
Checking table : cpn_2_m_membership_levels - Ok
Checking fields in table : cpn_2_m_membership_levels -
id - Ok
level_title - Ok
level_slug - Ok
level_active - Ok
level_count - Ok
Checking table : cpn_2_m_membership_relationships - Ok
Checking fields in table : cpn_2_m_membership_relationships -
rel_id - Ok
user_id - Ok
sub_id - Ok
level_id - Ok
startdate - Ok
updateddate - Ok
expirydate - Ok
order_instance - Ok
usinggateway - Ok

You will most likely never use it as I said, but it is here for you! :-)

And so that brings us to the end of the Options page, feel good about that?

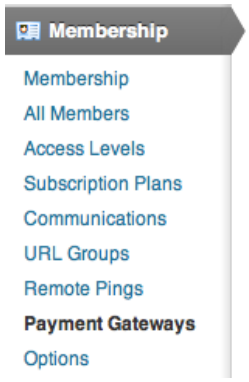
Great, lets move on then shall we!

Payment Gateways

So you the membership options solidly set up, you might even be ahead of us here and already have levels and subscriptions but now you need a way to take some hard cash. Lets do it!

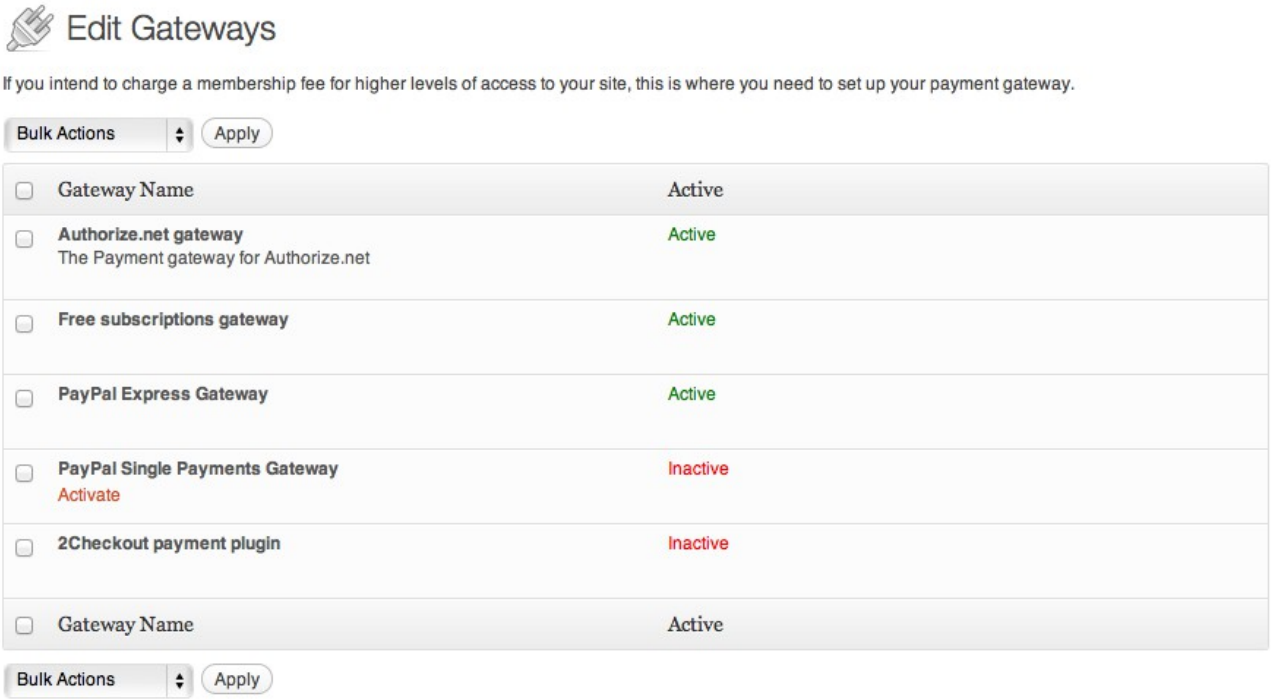
Pop on over to the Payment Gateway admin area:

Admin → Membership → Payment Gateways



You then have various options:

Authorize.net
Free Subscriptions
Paypal Express
Paypal Single Payments
2Checkout – 2CO



Hover over the gateway you wish to select and then click on the activate. In reality you will not activate the **Free Subscription Gateway** when taking payments, i.e. using any of the other options there. However you might want to offer a free subscription so you would

create a subscription level with no fee.

Note: Only one gateway should be used at a time.

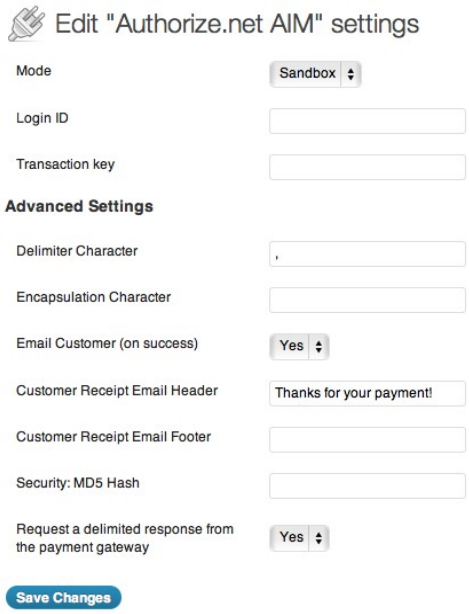
Lets go through each one.

Authorize.net

Please note: You will require an SSL certificate for this gateway.

Once activated you can hover over the Authorize.net gateway and see the following options:

Click on **Settings** to set this up.



Mode – You have two options here:

Sandbox
: You can use this mode when testing the gateway to ensure it is working with Authorize.net and no live transactions will ever be processed.

Live
: Once you are ready for the big bad world, you can go live and start raking in the cash.

Login ID
: To obtain your API Login ID:

1. Log into the Merchant Interface at https://secure.authorize.net
2. Select Settings under Account in the main menu on the left
3. Click API Login ID and Transaction Key in the Security Settings section
4. If you have not already obtained an API Login ID and Transaction Key for your account, you will need to enter the secret answer to the secret question

you configured at account activation.

5. Click Submit.

   The API Login ID for your account is displayed on the API Login ID and Transaction Key page.

Transaction Key - Like the API Login ID, the Transaction Key is a sensitive piece of account information that should only be shared on a need-to-know basis.

To obtain a Transaction Key:

1. Log on to the Merchant Interface at https://secure.authorize.net
2. Select Settings under Account in the main menu on the left
3. Click API Login ID and Transaction Key in the Security Settings section
4. Enter the secret answer to the secret question you configured when you activated your user account
5. Click Submit

The Transaction Key for your account is displayed on a confirmation page.

IMPORTANT: Be sure to record your Transaction Key immediately in a secure manner or copy it immediately to a file in a secure location because it is not always visible in the Merchant Interface like the API Login ID. Once you navigate away from the confirmation page there will be no other way to access the Transaction Key in the Merchant Interface. You would have to generate a new Transaction Key.

Delimiter Character

Leave this as the default for now, unless you know what you are doing and absolutely need to change it |

Encapsulation Character

Leave this as the default for now, unless you know what you are doing and absolutely need to change it. |

Email Customer (on success)

If you want to email your customer when the transaction is successful then set this to yes. The body of the email will be generated by the Membership plugin.

Customer Receipt Email Header

Set the subject of your email which the member will be sent.

Customer Receipt Email Footer

Then create a footer, maybe include your copyrights or some handy links with your signature.

Security: MD5 Hash

Leave this as the default for now, unless you know what you are doing and absolutely need to change it. |

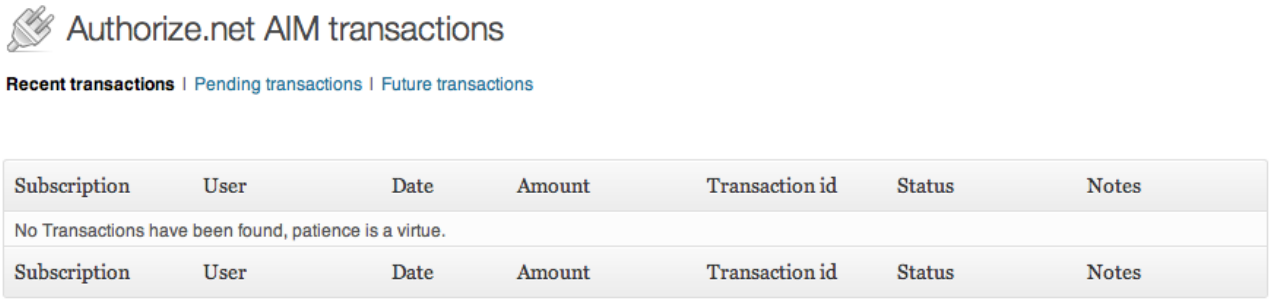
Request a delimited response from the payment gateway

Leave this as the default for now, unless you know what you are doing and

absolutely need to change it.

And then as always, click the **Save Changes** button.

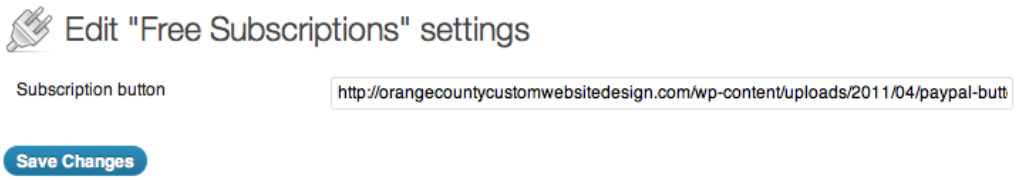
Back on the gateway page whilst hovering you will have seen View Transactions. Click on that will show us all the transactions done with this gateway.


Authorize.net AIM transactions
Recent transactions | Pending transactions | Future transactions
Subscription User Date Amount Transaction id Status Notes
No Transactions have been found, patience is a virtue.
Subscription User Date Amount Transaction id Status Notes

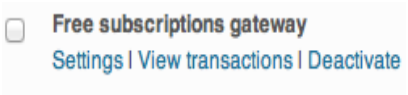
Free Subscription

This Gateway will provide a button on any subscriptions which are free. (not needed for **Stranger Access**).

If you are offering premium subscriptions as well then you wouldn't use this gateway, you would simply offer a free subscription with the gateway you use to take payment. That is because upgrading or downgrading between gateways are not supported.

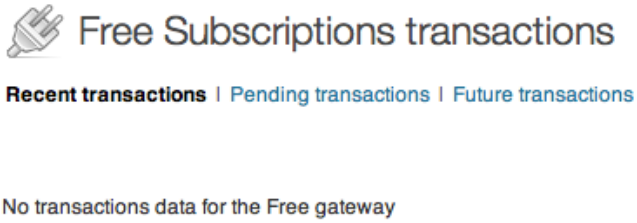


Hover over the gateway and select settings.



There are no fancy settings here, you can simply insert the URL of an image to use with this gateway.

You can view all the transactions on this gateway.


Free Subscriptions transactions
Recent transactions | Pending transactions | Future transactions
No transactions data for the Free gateway

Paypal Express & Single Payment

The setup process of these two plugins are virtually identical with the exception of one button which is the “Renew” button. In Single Payment this is not needed as it will not set up or process subscriptions with Paypal, it will only process a single payment at a time, thus meaning each time your members are due to renew will need to manually process their renewal. Paypal Express Supports Subscriptions.

Paypal will return the transaction using IPN automatically using notify_url so you shouldn't need to set a specific IPN within Paypal.

PayPal Mode
If you wish to test the connectivity with Paypal

PayPal Email
This will be your Paypal account email, If you are in sandbox mode you will need to use Sandbox credentials.

PayPal Site
Here you select which is the main Paypal website for your country.

Paypal Currency
This option can only be changed from the options page, under the extras tab:

Admin → Membership → Options → Extras

Still not sure, then pop back to the options page part of this tutorial.

Subscription Button
This is the image link which users will click to subscribe. You could use a custom one if you wish, or leave it with the default entered upon activation.

Renew
This is the image link which users will click to renew. You could use a custom one if you wish, or leave it with the default entered upon activation. ← **Not available in Paypal Single Payment**.

Upgrade button
This is the image link which users will click to upgrade. You could use a custom one if you wish, or leave it with the default entered upon activation.

Cancel button
This is the image link which users will click to cancel. You could use a custom one if you wish, or leave it with the default entered upon activation.

You can view all the transactions on both these gateways by hovering over the gateway and clicking **View Transactions**.

2Checkout – 2CO

2Checkout Username
Your 2CO username.

2Checkout Password

You 2CO password.

2Checkout Seller ID
You 2CO Seller ID.

2Checkout Secret Word
To set up the secret word please log in to your 2CO account, click on the "Account" tab, then click on "Site Management" subcategory.

On the "Site Management" page you will enter the Secret Word in the field provided under Direct Return.

After you have entered your Secret Word click the blue "Save Changes" button at the bottom of the page.

2Checkout Currency
This option can only be changed from the options page, under the extras tab:

Admin → Membership → Options → Extras

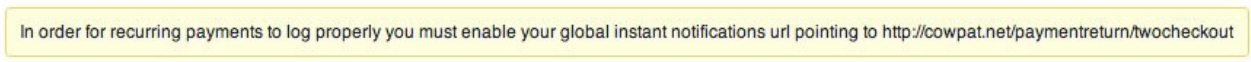
2Checkout Mode
You can set this into live mode to process real payments or pop it into test mode whilst you are testing your whole set up so that no real cash is exchanged.

Subscription button
This is the subscription button for your payments, you could enter any custom image you wish here, or use the default one upon gateway activation.

You can view all the transactions by overing over the gateway.

One further step is needed, you should see a yellow information box with the following:

In order for recurring payments to log properly you must enable your global instant notifications url pointing to http://cowpat.net/paymentreturn/twocheckout

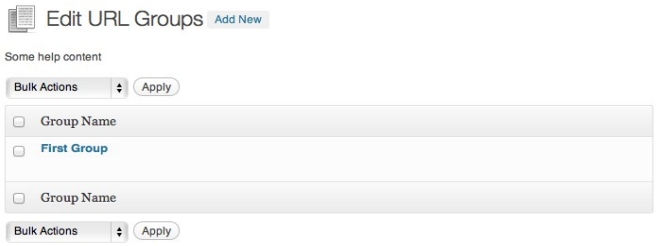

In order for recurring payments to log properly you must enable your global instant notifications url pointing to http://cowpat.net/paymentreturn/twocheckout

On your install that will of course be your url, so you will need to log into 2CO and then enable your Global Instant notification url with the link provided to your site.

URL Groups

URL Groups can be a rather advanced features. You can use this to protect groups of URLS including those using regular expressions.

Admin → Membership → URL Groups



And then click on the **Add New** button.

Group Name
: Add something relevant to this group of links. So if you were protecting contents of a category, perhaps its would be “Protect CAT-NAME”

Page URLs
: Each line must contain only one link. So once you enter one then enter the next one on a new line.

Strip Query Strings
: If any of the links have queries in them this will strip the query, for example:

/wp-admin/edit.php?post_type=page

Would become

/wp-admin/edit.php

Regular Expression
: If any of the urls have regular expressions in them, you must enable this option.

If we enable Regular Expressions then as an example we could protect all posts in a category whilst will enabling access to the category archive page.

In the Page URLs we would enter:

http://domain.com/category/.+

The .+ is a Regular Expression, this will allow you access to the category but then protect all the contents (single pages/posts/custom post type). This could be great for online magazine where you want your readers to see the archive page but restrict the goodness within to those paying subscribers.

Here is a cool Regular Expression Cheat Sheet:
http://www.cheatography.com/davechild/cheat-sheets/regular-expressions/

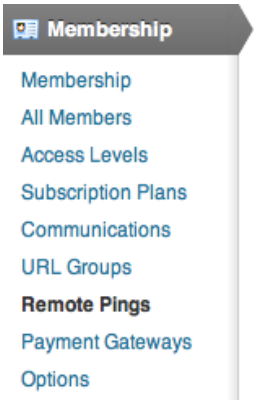
Pings

This really is an advanced feature, its not something everyone needs either, but the power it wields by someone who can control this beast is immense. ;-)
Lets get simple for a moment and assume you used a remote service like MailChimp to send your newsletters and you wanted some level of integration like a user registers you then **Ping** Mail Chimp to action a task. Or when the subscription ends you Ping Mail Chimp to cancel a task. Thats this feature, it will do that for you but its complex to understand at first even with a with a simple form. It made my head hurt when I first used the Membership plugin, so you have been warned. ;-)

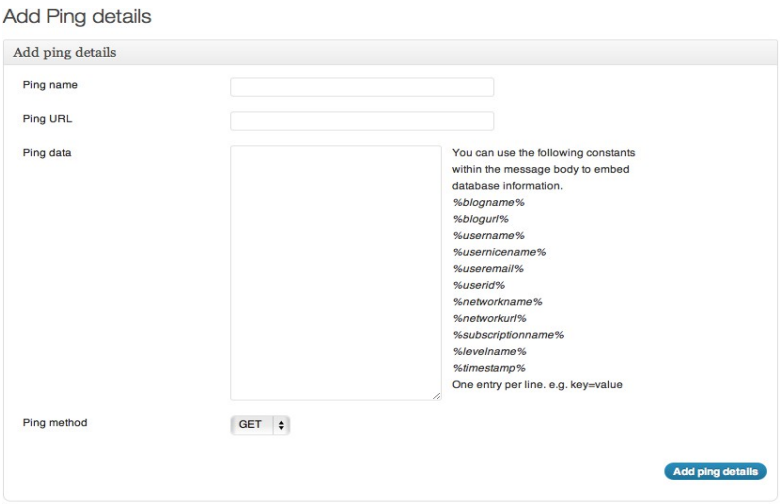
Skip over this section if it does not interest you much and you have no need for it.

Admin → Membership → Remote Pings

/wp-admin/admin.php?page=membershippings



Lets get started, click on the **Add New** button to create a new **Remote Ping**.



Looks simple right?

So we mentioned MailChimp and we'll stick with that for now. Lets assume you want it so that when someone signs up they are also auto subscribed to MailChimp.

You can find the MailChimp Api details right here:

http://apidocs.mailchimp.com/api/1.3/

Ping Name

You can call it anything you like, I prefer it to be meaningful. I'll call this **Automatic MailChimp Signup**

Ping URL

This is the Ping URL following the 1.3 API details set out in the link I provided to the MailChimp API docs.

http://<dc>.api.mailchimp.com/1.3/

Where <dc> should be replaced with the portion after the dash in your API Key. e.g. "us1", "us2", "uk1", etc. A solid example - say your API Key is myapikey-us2. You are in us2, so your API Endpoint would be:

http://us2.api.mailchimp.com/1.3/

We will then add a **?** so this field should have:

http://us2.api.mailchimp.com/1.3/*?*

And everything then after the **?** will be our query string, we will pop the query string into the next box.

Ping Date

This is where the query string will go. Its one item per row, so be sure not to stick it all on one line.

Lets enter the following:

```
method=listSubscribe
apikey=XXXXX-us4
id=XXXXX
email_address=%useremail%
double_optin=false
update_existing=true
send_welcome=false
```

Method

The method we use is **listSubscribe** to add your new member to the MailChimp subscription list:

http://apidocs.mailchimp.com/api/1.3/listsubscribe.func.php

API Key
: We then enter the API Key, so replace **XXXXX-us4** with your own key.

ID
: This is your list ID and can be found within the MailChimp dashboard.

Email Address
: Which email address will be subscribed, notice we are passing in a constant there to pull the data dynamically from our database.

Double Optin
: Because they are signing up for a membership, we might want to add them automatically to the email list as well. So I set it to false here. Just keep in mind that if MailChimp believe you are abusing this feature then your account could be terminated. So just ensure your users know they are getting on the mailing list as well. Or set it to true, forcing them to confirm they opt in for your mail shots.

Update Existing
: This will update any existing email subscription within MailChimp.

Send Welcome
: This will fire off a welcome email to your new subscribers. We have set it to false as we don't want to bombard them with welcome emails from us do we? Its rhetorical, don't worry about it. :-)

Ya, thats it for Pings.... Simples huh!

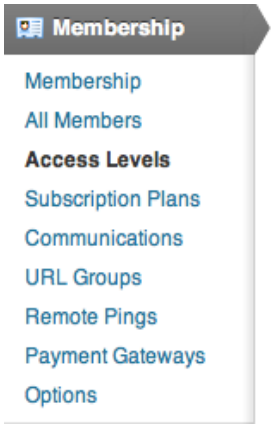
Access Levels

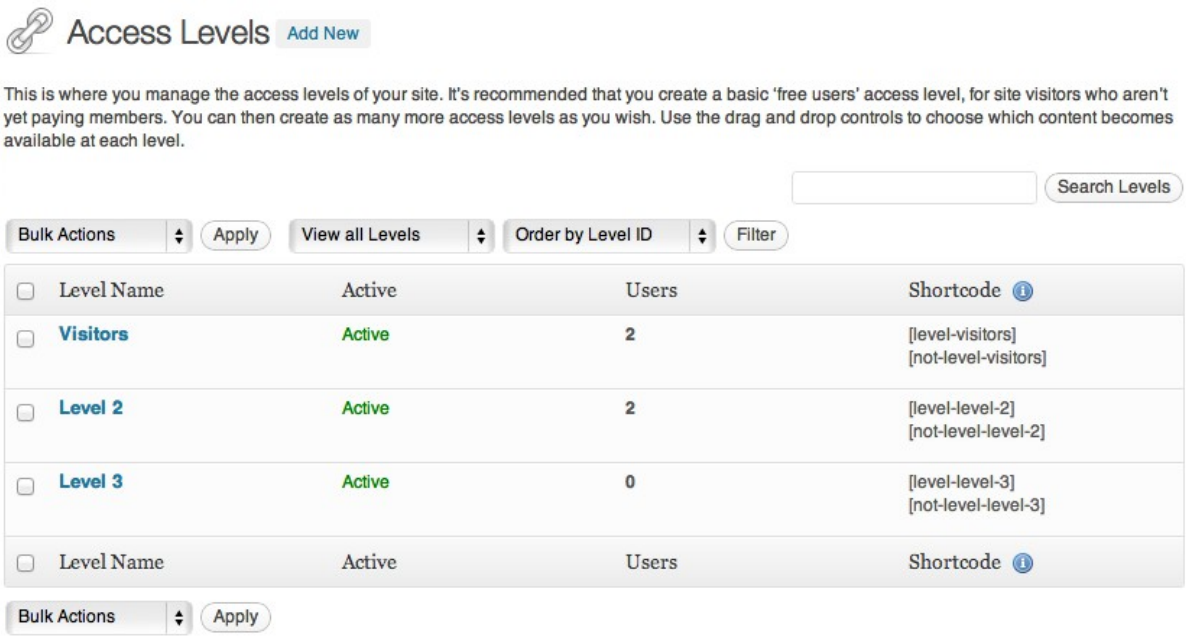
This controls the levels of access to your site, so you create different levels with different access.

Perhaps when you come to create a subscription you give access to level 1 for the first 30 days, then after that they move to level two. This is drip content and a great way to reward those members who stick with you and renew their subscriptions.

Or you might only have one level per subscription, its up to you but lets go create one now.

Admin → Membership Access Levels → Add New





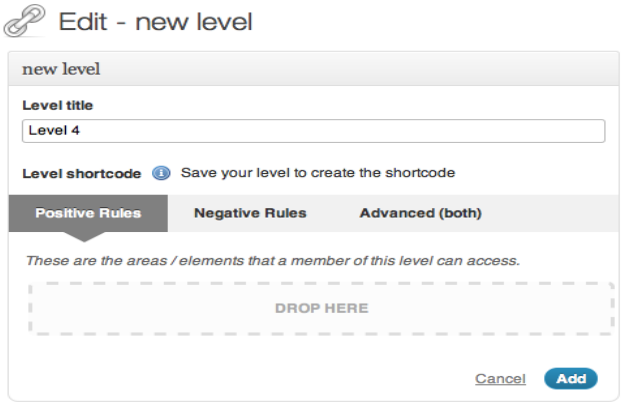
Version 3.1 brings a new feature to the table, you now have a brand new shortcode for people not on a specific level. As an example use you could create a post or a page and then have content only for your members on that level, you would then use the [not-level] shortcode to display a message, perhaps like so:

[level-level-2]
This is your fabulous content which will only be seen by people whom have a subscription and access to this Level.

[/level-level-2]
[not-level-level-2]
Hey we see you don't yet have a subscription with us, signup today and take advantage of our super powered huge brains!
[/not-level-level-2]

You could even link to your subscription page so they can upgrade.

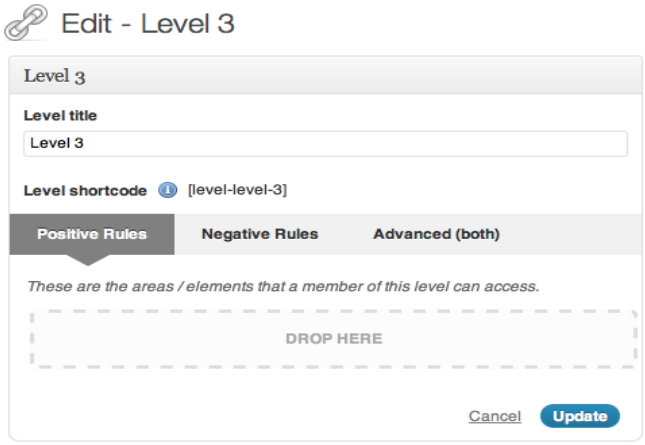
I created those levels earlier with our Wizard in the membership dashboard. So for this tutorial I'll do this as if we are creating Level 3.



The first option is of course the Level Title, so here I entered Level 3.

Before I go any further, I'm going to quickly save this one and so I click on the **Add** button.

Lets take another peek now what it looks like.



You see the difference? If not look again..... Now?

Level Shortcode

Now a new short code is shown, you can use this shortcode to hide content which is restricted for this level only. This is handy if you don't wish to protect a whole page or post but you want to protect some content in a post or page. You use this by popping the shorcode around the content you want to protect. This could be a download, some text, and image or anything else you can put on in there.

So it would look like this for Level 3:

> ***[level-level-3]****Hey I'm protected content, I could be a download, a coupon code, some text, a many paragraphs of text or anything else you want****[/level-***

level-3]

Rules

There are 2 main types of rules, with three options over all. You can select **Positive** or **Negative** rules which is real easy to get set up. Or if you really need both, you can go into **Advanced**. Just let it be known that **Advanced** is not for the novice, you could find content protected which shouldn't be or content not protected which should be as well as other conflicts because rules need to be set up correctly.

So if you want simplicity it would be advisable to use either one set of rules or the other.

Positive Rules

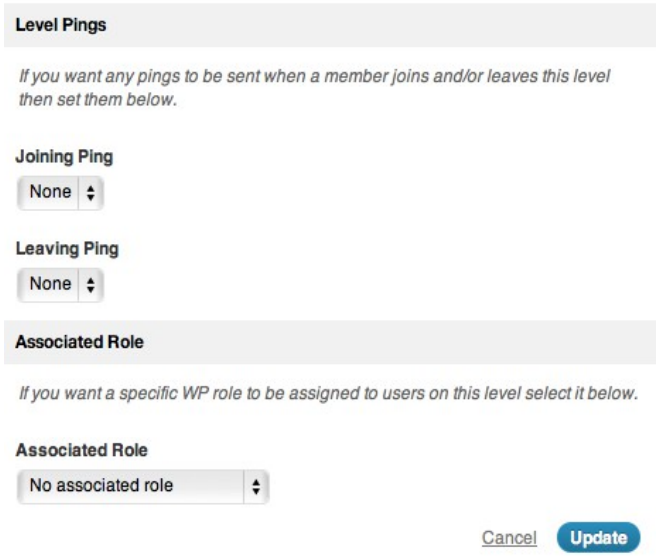
Every member with access to this level will be able access the content you specify.

Negative

Every member with access to this level will not access anything in the negative list thus assuming anything not added is available to them (not dropped in or not selected).

Advanced

This will allow you to set both Positive and Negative rules. There is a huge advantage to the advanced mode which is as follows:


Level Pings
If you want any pings to be sent when a member joins and/or leaves this level then set them below.
Joining Ping
None
Leaving Ping
None
Associated Role
If you want a specific WP role to be assigned to users on this level select it below.
Associated Role
No associated role
Cancel
Update

Level Pings

We covered this earlier, it will send custom pings to internal or remote services like Mail Chimp for example.

Associated Role

Here you can set a custom role for the user to be assigned to, perhaps they could become a contributor for your site, or you might have some custom roles with special access to certain options. Just be sure you don't let them sign up for full administrator control unless of course you want them too.... ;-)

In Advanced mode, just keep in mind you don't have to use both Positive and Negative even though both options are available, just thought I would throw that out

there. :-)

The most commonly asked questions are usually confusion around how rules really work and why content can or not be seen. Lets break this down a little, each Level is independent from the other. So positive or negatives set in one level will not affect the other.

If you did not set a stranger level then by default anyone not on a level will never be able to see content. That anything on your site at all.

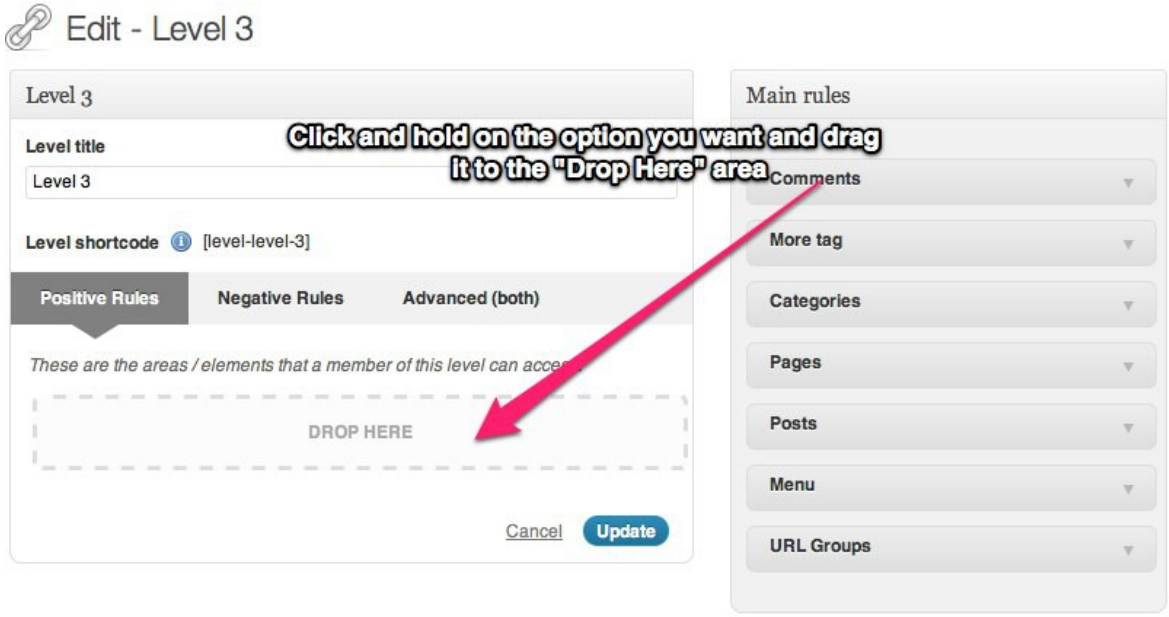
If you are logged in as Admin you get to see all the content including shortcodes.

Its important you keep that in mind. :-)

When using the Stranger level you will need to set some restrictive rules to prevent them seeing content which you wish only for the eyes of users on other levels. Well... Except for the register page. This could be handy in a multisite install where your main site is the one with all the sales blurb and then all the subscription stuff is on a sub site.

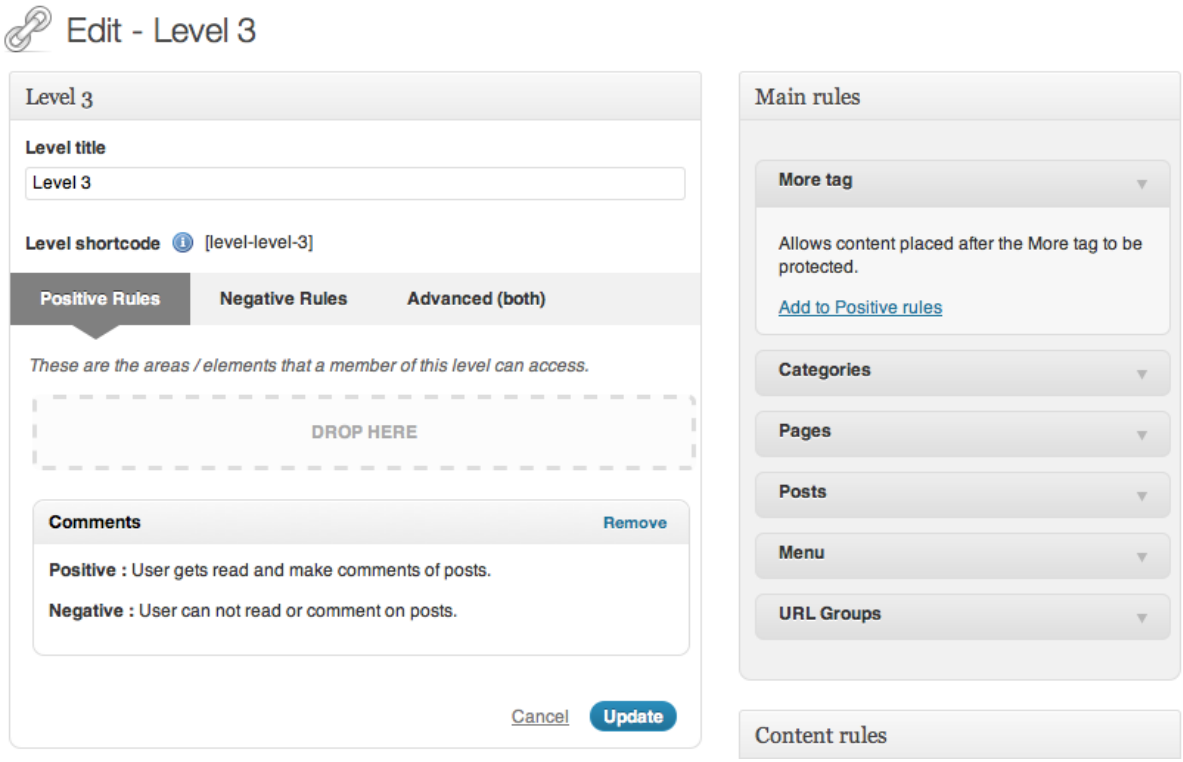
Types of Rules

The admin interface is drag and drop and so if you wanted to add a rule for something from the **Main Rules** then drag it on over. Same for **Content Rules** and all the others.



We won't use screenshots on them all independently because some of them have no settings.

As an example here are the comments when added.



You will see that all there is in the comments area once added is just a note telling you how it works for **Positive** or **Negative** rules.

Main Rules

Comments

Positive - User gets read and make comments of posts.

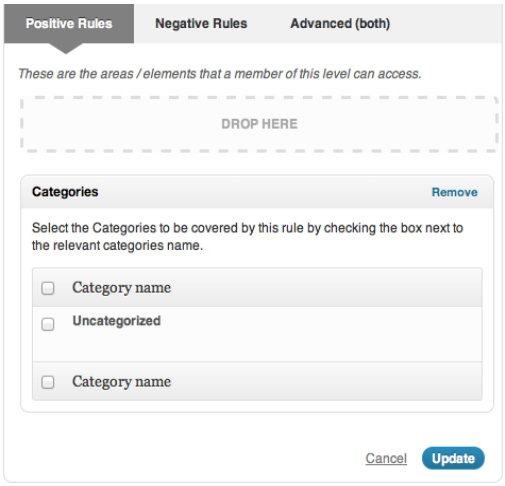
Negative - User can not read or comment on posts.

More Tag

Positive - User can read full post content beyond the More tag.

Negative - User is unable to read full post content beyond the More tag.

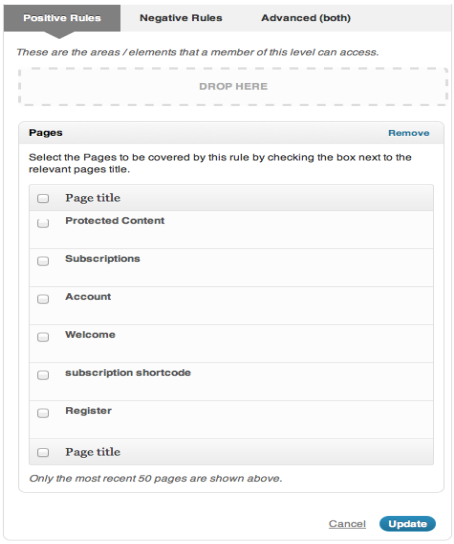
Categories



Positive – Users can see selected categories. Categories not selected will not be available to the level.

Negative – Users can not see the selected categories. Categories not selected will be available to this level.

Pages

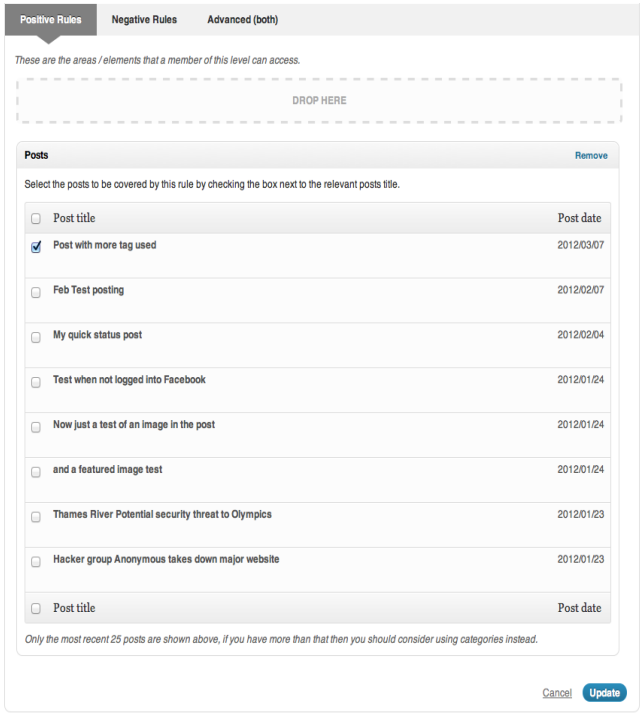


Positive – Users can see selected pages. Pages not selected will not be available to the level.

Negative – Users can not see the selected pages. Pages not selected will be available to this level.

Note: Only the most recent 50 pages show here. You can alter this by defining a constant in your wp-config.php file. Please checkout the “Constants” are of this tutorial for what code to use.

Posts

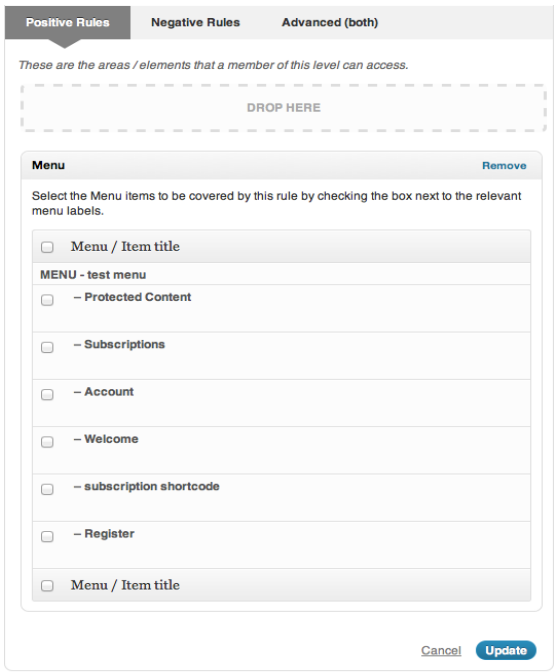

Positive Rules
Negative Rules
Advanced (both)
These are the areas / elements that a member of this level can access.
DROP HERE
Posts
Remove
Select the posts to be covered by this rule by checking the box next to the relevant posts title.
Post title
Post date
Post with more tag used 2012/03/07
Feb Test posting 2012/02/07
My quick status post 2012/02/04
Test when not logged into Facebook 2012/01/24
Now just a test of an image in the post 2012/01/24
and a featured image test 2012/01/24
Thames River Potential security threat to Olympics 2012/01/23
Hacker group Anonymous takes down major website 2012/01/23
Post title
Post date
Only the most recent 25 posts are shown above, if you have more than that then you should consider using categories instead.
Cancel
Update

Positive – Users can see selected posts. Posts not selected will not be available to the level.

Negative – Users can not see the selected posts. Posts not selected will be available to this level.

Note: Only the most recent 25 pages show here. You can alter this by defining a constant in your wp-config.php file. Please checkout the "Constants" are of this tutorial for what code to use.

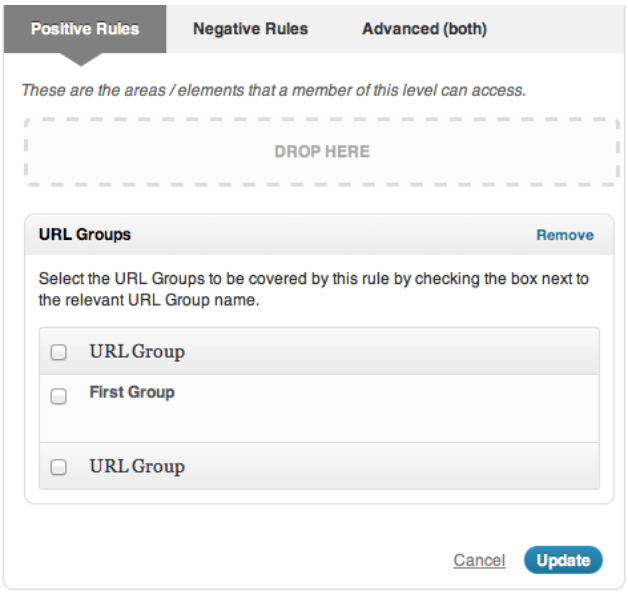
Menu



Positive – Users can see selected menu items. Menu items not selected will not be available to the level.

Negative – Users can not see the selected menu items. Menu items not selected will be available to this level.

URL Groups


Positive Rules
Negative Rules
Advanced (both)
These are the areas / elements that a member of this level can access.
DROP HERE
URL Groups
Remove
Select the URL Groups to be covered by this rule by checking the box next to the relevant URL Group name.
URL Group
First Group
URL Group
Cancel
Update

If you are using URL Groups as covered earlier in this tutorial then you can also add them to positive or negative rules.

Positive – Users can see selected URL Groups. URL Group not selected will not be available to the level.

Negative – Users can not see the selected URL Groups. URL Groups not selected will be available to this level.

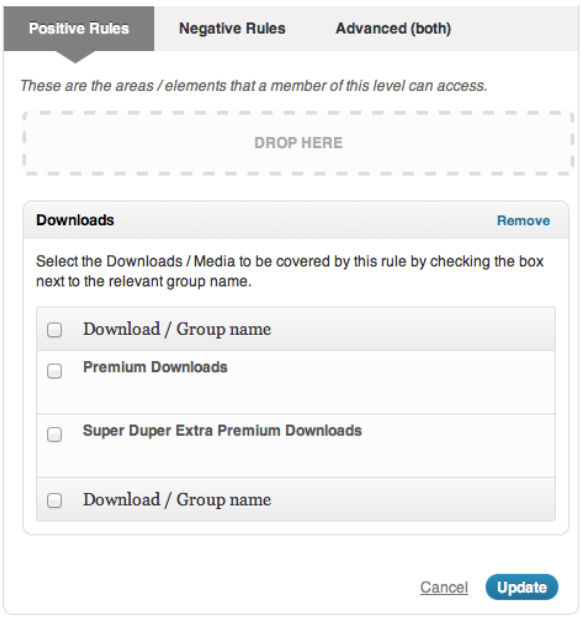
Content Rules

Downloads

If you wish to protect downloads, then earlier in this tutorial whilst on the Options page you will have defined some Protected Groups in the Downloads / Media tab. If you didn't but wish to add some rules, then pop back there and get it set up.

We'll wait for ya here! ;-)

I set up a couple, lets take a look:


Positive Rules
Negative Rules
Advanced (both)
These are the areas / elements that a member of this level can access.
DROP HERE
Downloads
Remove
Select the Downloads / Media to be covered by this rule by checking the box next to the relevant group name.
Download / Group name
Premium Downloads
Super Duper Extra Premium Downloads
Download / Group name
Cancel
Update

So we could use Premium Downloads for one level and then have separate Super Duper ones for another level.

Or you could let one level have access to only one of them, and then the next level could maybe access them both. Its your choice here, you decide! ;-)

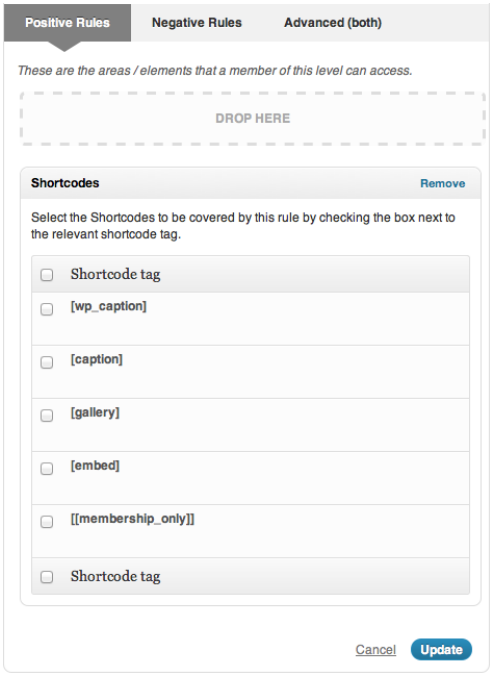
Positive – Users can view and download from the selected group name. Download Groups not selected will not be available to the level.

Negative – Users can not view and download from the selected group name. Download Groups not selected will be available to this level.

Shortcodes

Any plugin using shortcodes to display or perform some action can be protected. So for example you could protect the WordPress [gallery] shortcode. This will ensure anywhere in your website where you use the WordPress gallery feature, those shortcodes will be protected under the membership plugin. Even MarketPress shortcodes can be used here.

If you are using a plugin which has shortcodes not seen in this list, don't worry as always we have you covered. If you remember earlier in this tutorial when configuring the options page, under the the **Content Protection** tab there was an option **Admin Only Shortcodes**, this will allow you to add those missing shortcodes.

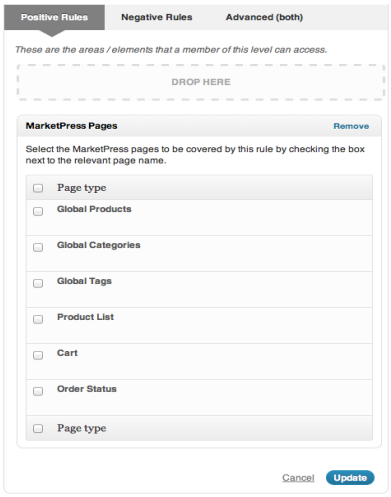


Positive – Users can view content produced by a given shortcode. Shortcodes not selected will not be available to the level.

Negative – Users can not view content produced by a given shortcode. Shortcodes not selected will be available to this level.

MarketPress

If you have MarketPress installed (our amazing commerce cart) then you will find further options here to protect specific pages including the checkout and cart.



Positive – Users can view MarketPress pages. Pages not selected will not be available to the level.

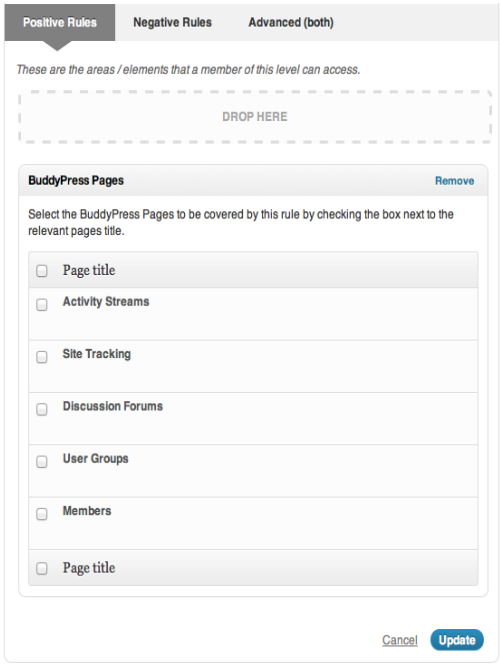
Negative – Users can not view MarketPress pages. MarketPress not selected will be available to this level.

BuddyPress Rules

BuddyPress Pages

Looking for a cool way to restrict BuddyPress to certain members only?

Well this is it, just select which pages you want and need. Protect your Activity Stream, you Forums, your members, etc.



Positive – Users can view BuddyPress pages. Pages not selected will not be available to the level.

Negative – Users can not view BuddyPress pages. Pages not selected will be available to this level.

Private Messaging

Yup that is right, you can prevent your users from taking advantage of the private messaging feature, unless of course they are subscribing to the right level.

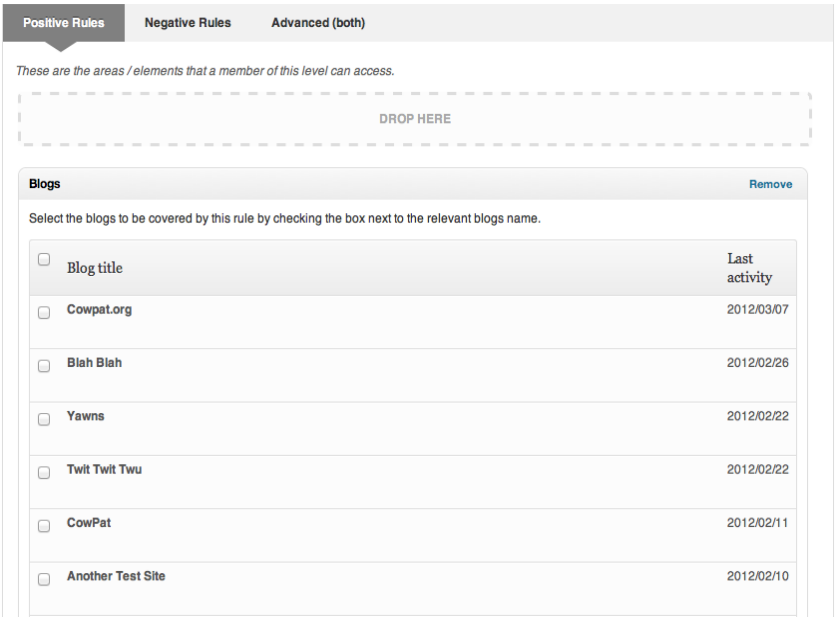
Positive: User can send messages.

Negative: User is unable to send messages

Blogs

This rule will remove or allow the mention of specific blogs in your BuddyPress **Site Tracking** area which is also known as **Blogs**.

This will not protect the actual blogs. Just thought I'd mention that so you don't get confused by its purpose. :-)

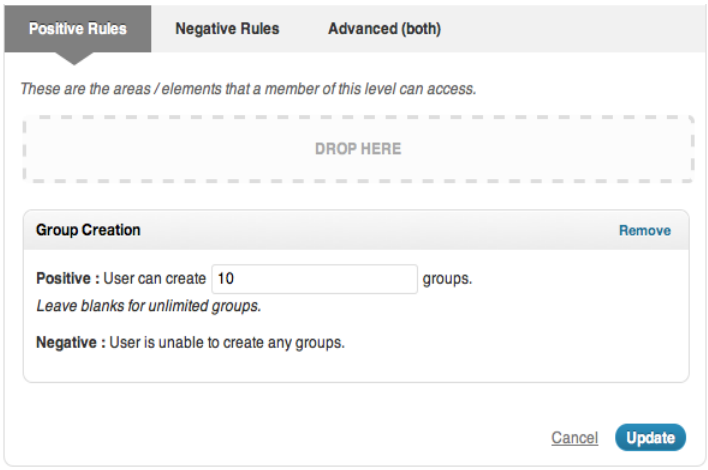


Positive – Users can view links and activity to sites listed in the BuddyPress **Site Tracking**. Blogs not selected will not be visible on this page to the level.

Negative – Users can not view links and activity to sites listed in the BuddyPress **Site Tracking** . Blogs not selected will be visible to this level.

Group Creation

If you were looking for a way to prevent or restrict group creation, thats here. You could allow, say one group for level 1 membership, but then allow level 2 to create say.... 10? As always its your choice, you decide how you want that to work. :-)


Positive Rules
Negative Rules
Advanced (both)
These are the areas / elements that a member of this level can access.
DROP HERE
Group Creation
Remove
Positive : User can create 10 groups.
Leave blanks for unlimited groups.
Negative : User is unable to create any groups.
Cancel
Update

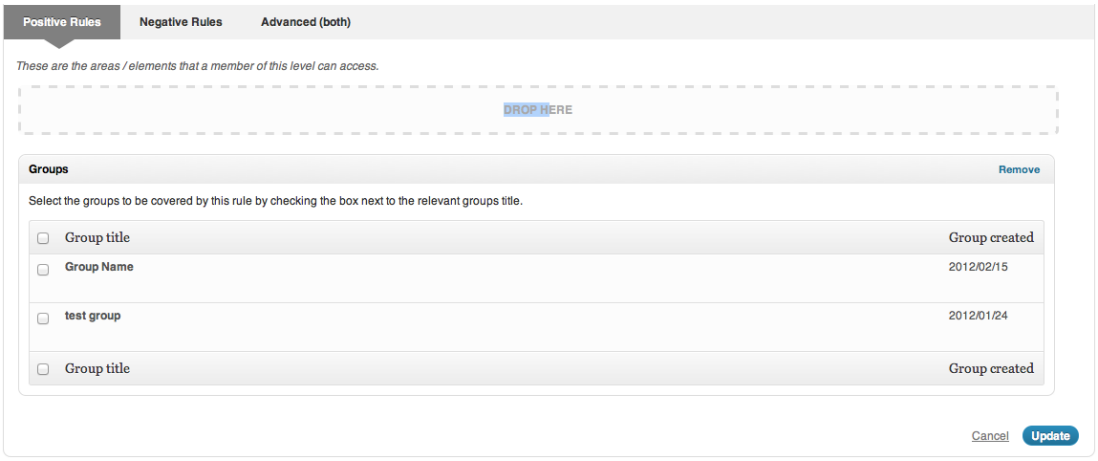
Positive: Users can create the amount of groups you define.

Negative: Users are unable to create any groups.

Groups

If you had some premium groups, maybe they are used for support, notifications to members, or for some other cause you have, then you can restrict the access to these for

different levels.



Positive – Users can join and use BuddyPress groups. Groups not selected will not be available to the level.

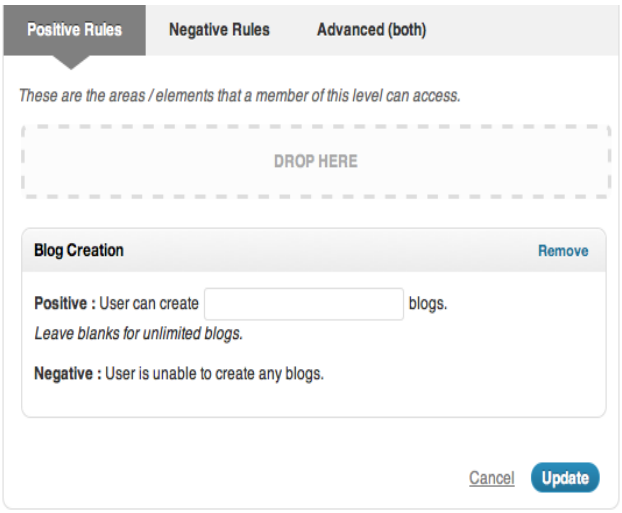
Negative – Users can not join and use BuddyPress groups. Groups not selected will be available to this level.

Administration Rules

Blog Creation

Are you allowing users to signup for their own blogs within your WordPress Multisite?

With these rules you can limit the amount of blogs they can create by Access Level. Cool eh!

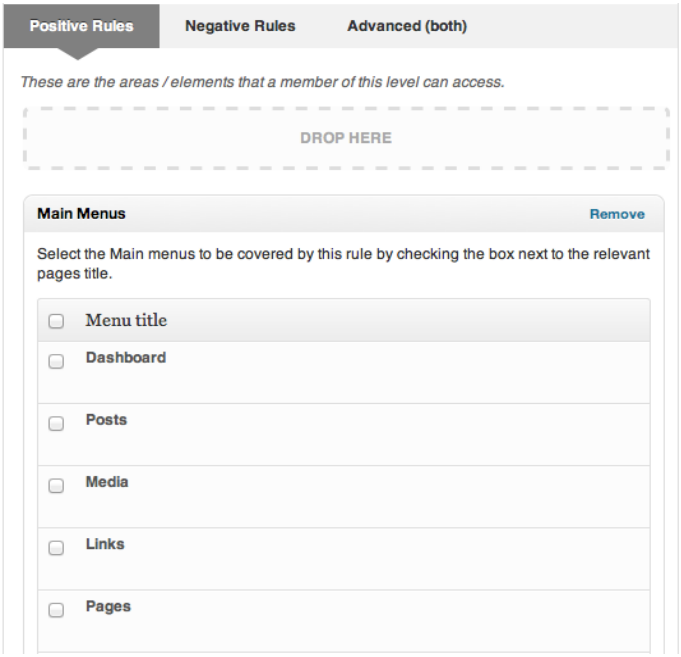


Positive: User can create however many blogs you define here. Don't enter a number to remove the restriction, thus making it unlimited.

Negative: Users on this level will not be able to create any blogs.

Main Menus

With this rule you could restrict access to certain menu items, so lets say you sell a website within a multisite install. You could then prevent access to the menu options for creating pages or for the Tools menu.

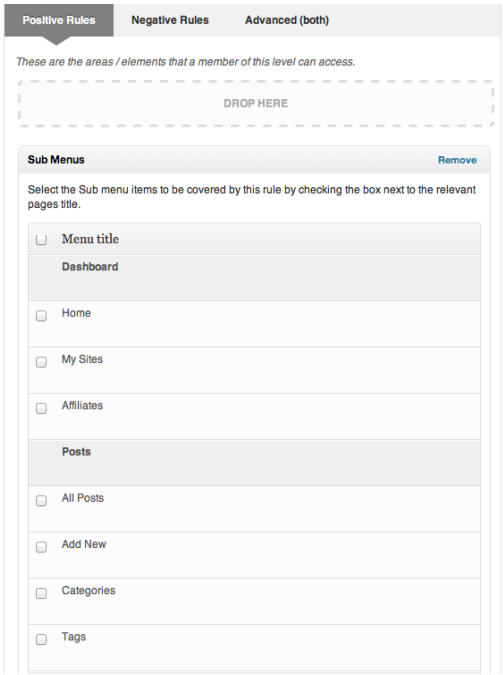


Positive – Users can see this menu item.

Negative – Users can not see this menu item.

Sub Menus

If you didn't want to hide a whole menu, but just wanted to hide a couple of the sub menus then that is fine also. :-)

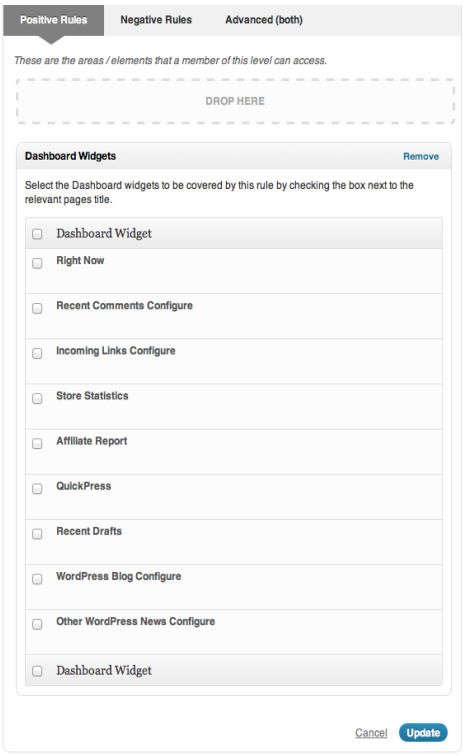


Positive – Users can see this sub menu item when selected.

Negative – Users can not see this sub menu item when selected.

Dashboard Widget

You can even remove dashboard widgets if you wanted to, how cool is that!

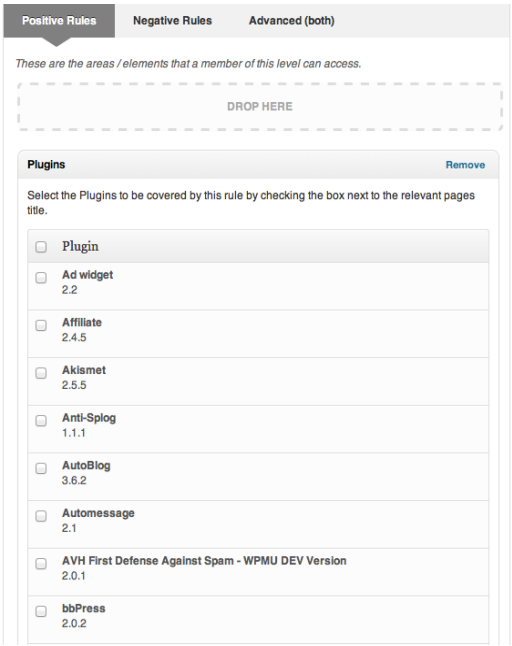


Positive – Users can see dashboard widgets when selected.

Negative – Users can not see dashboard widgets when selected.

Plugins

If you are using the Membership plugin to restrict the use of plugins then you can decide which levels have access to those features.



Positive – Users can install plugins when selected.

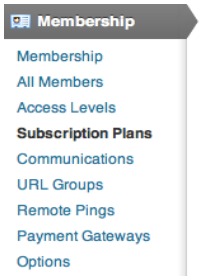
Negative – Users can not install plugins when selected.

Subscription Plans

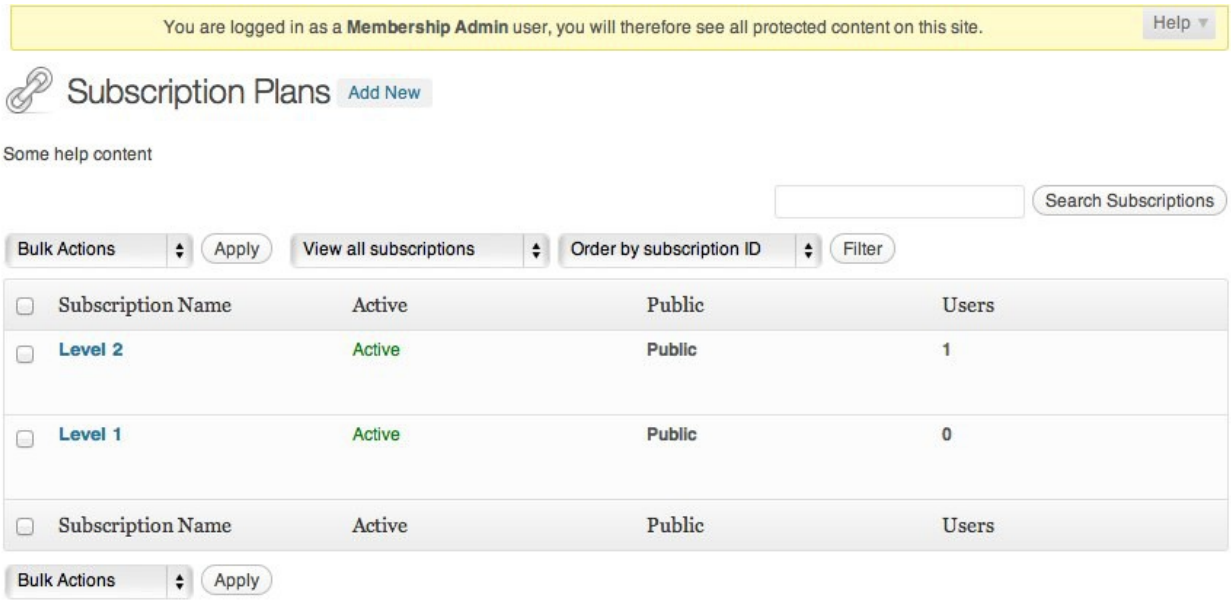
Now we have our **Access Levels, Pings**, and all the other options ready. We no just need to make some subscriptions to add those Access Levels to, this is where sort the finances out. So lets do that now.

Admin → Membership → Subscriptions

/wp-admin/admin.php?page=membershipsubs



In my setup I currently have two **Subscriptions**:



You can see here that there is a button to **Add New** subscriptions, which... Erm.... Adds a new subscription. :-)

You can see which plans are active, public or private and how many users are on those plans.

You don't need a free subscription plan here, unless of course your making some offer. Those who are not subscription members and using the stranger level do not need a subscription.

Bulk Actions

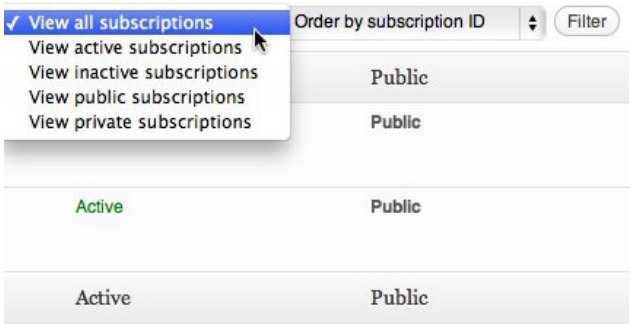
Delete

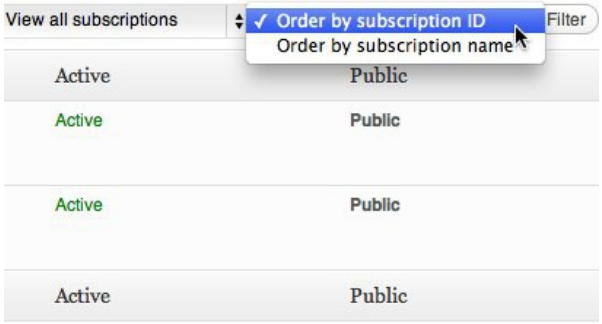
If you check multiple subscriptions you can then bulk delete them.

Toggle Activation
: You can check multiple subscriptions and activate/deactivate them

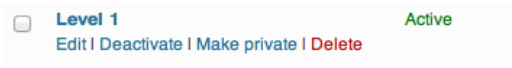
Toggle Public Status
: You can check multiple subscriptions and set them to be public or private for users.

You also have various filters for order the subscription and you can even search through the subscriptions.





Hovering over the subscription will allow you to Edit, Activate/Deactivate, Make Public/Private or Delete:

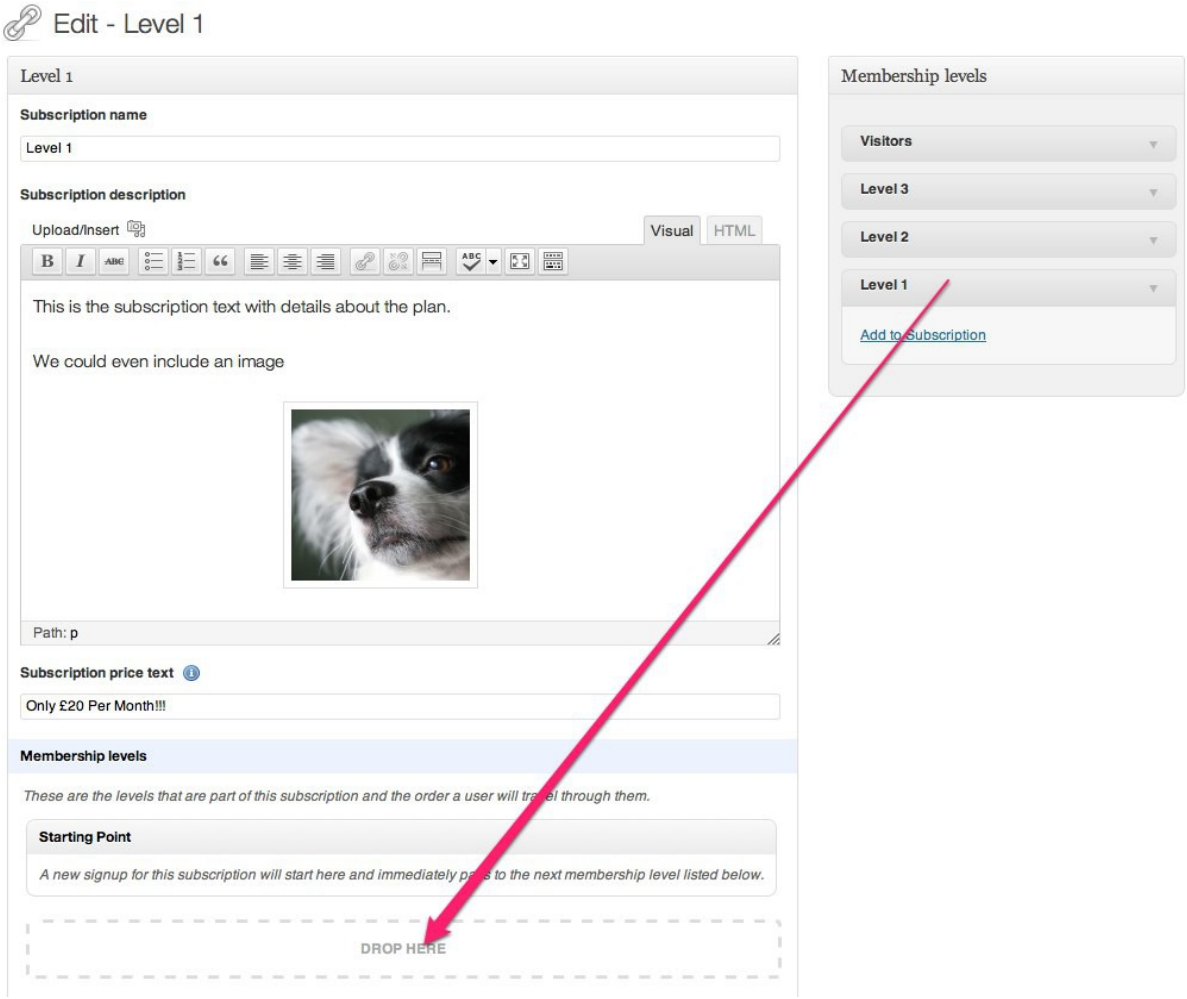


I'm going to edit Level 1 for this tutorial.

Making A Subscription Plan

If you were starting a fresh and did not use our wizard then you would click the **Add New** button. I already have my plans set out from the wizard, so I'm going to edit one of them.

This is what the Subscription Plans page looks like:


Edit - Level 1
Level 1
Subscription name
Level 1
Subscription description
Upload/Insert
Visual
HTML
This is the subscription text with details about the plan.
We could even include an image
Path: p
Subscription price text
Only £20 Per Month!!!
Membership levels
These are the levels that are part of this subscription and the order a user will travel through them.
Starting Point
A new signup for this subscription will start here and immediately pass to the next membership level listed below.
DROP HERE
Membership levels
Visitors
Level 3
Level 2
Level 1
Add to Subscription

You will notice this is similar to the **Access Level** editor page. You simply need to drag the levels over which will be applicable to this **Subscription Plan**. We will cover that in a moment.

Subscription Level

This can be anything you wish, perhaps you will have Bronze, Silver, Gold and Platinum levels or be original like me and have Level 1, 2 and 3. :-)

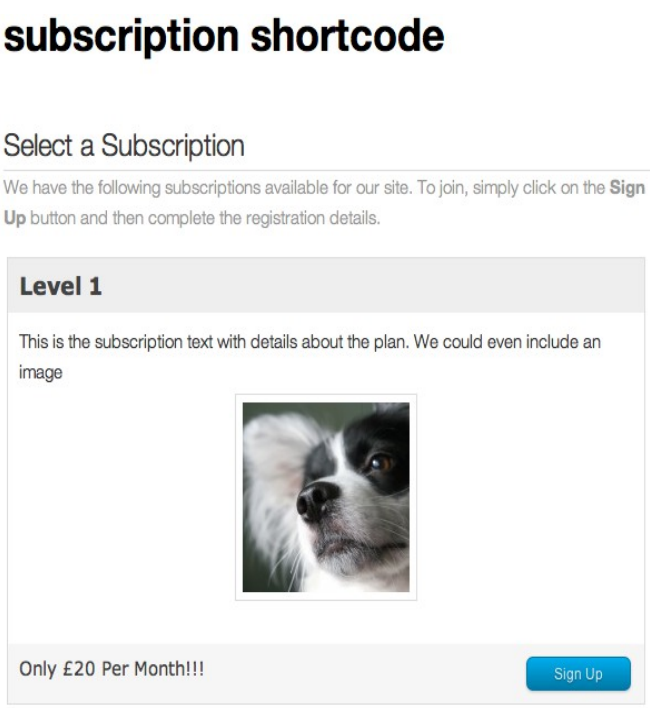
Subscription Description

Whack all the details about your subscription in there, include some promo text, images, or what ever you wish. Notice what I had in mine? You will see a screenshot from the front end in a moment to see how that one looks again.

Subscription Price Text

This is just some sales blurb, like "*Grab our top subscription for only $10*" or something like that.

On the front end it looks like this:

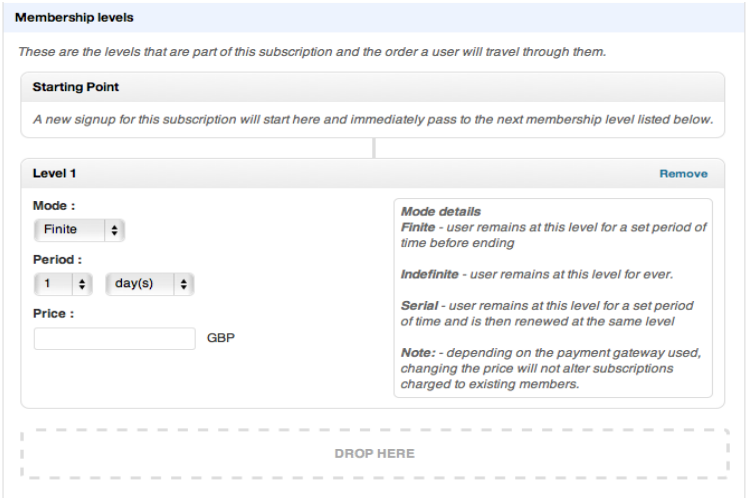

subscription shortcode
Select a Subscription
We have the following subscriptions available for our site. To join, simply click on the Sign Up button and then complete the registration details.
Level 1
This is the subscription text with details about the plan. We could even include an image
Only £20 Per Month!!!
Sign Up

Cool, eh!

Membership Levels

We now drag those **Access Levels** over which will use this plan. You can click on the drop down, you can also click "Add Level" rather than dragging them if you wish.

I'm going to drag over my **Access Level**, Level 1.


Membership levels
These are the levels that are part of this subscription and the order a user will travel through them.
Starting Point
A new signup for this subscription will start here and immediately pass to the next membership level listed below.
Level 1
Remove
Mode :
Finite
Period :
1
day(s)
Price :
GBP
Mode details
Finite - user remains at this level for a set period of time before ending
Indefinite - user remains at this level for ever.
Serial - user remains at this level for a set period of time and is then renewed at the same level
Note: - depending on the payment gateway used, changing the price will not alter subscriptions charged to existing members.
DROP HERE

Notice now there are some more options for us to select on the **Access Level** 1.

Mode

Finite

User Remains at this level for a set period of time before their subscription ends.

You would use this mode if you offered a one off subscription where they would need to manually renew.

Indefinite

With this mode, anyone who subscribes are added indefinitely aka forever.

Serial

If you are wanting auto renewals then this mode will let them stay on the level for a set period of time before auto renewing.

As you see there is a note there stating that with some gateways, altering the plans here for existing users will not have any affects on their renewal price.

Period

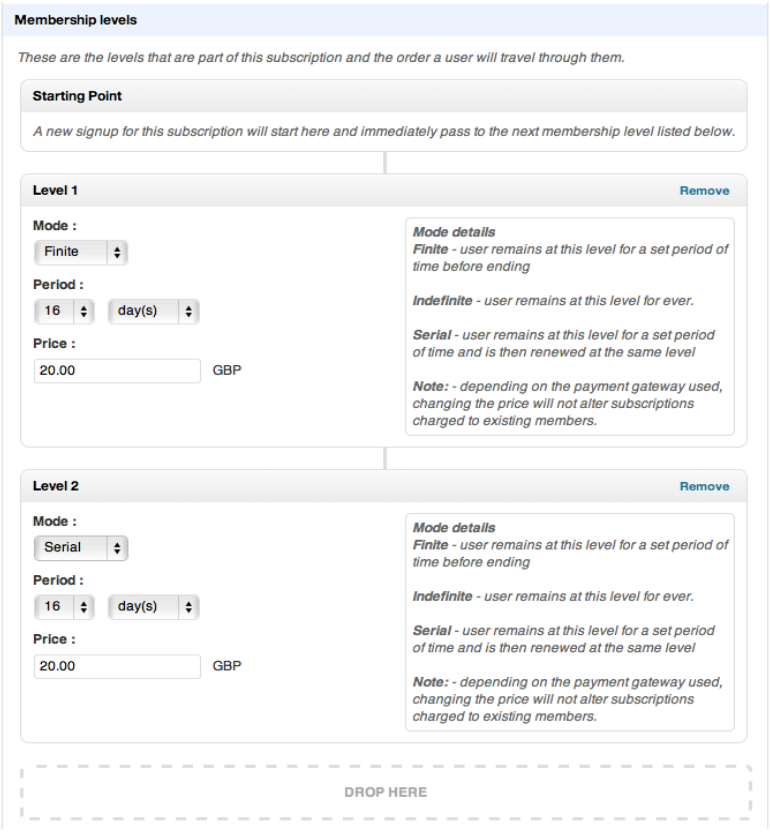
Next you can set the period this level will be active for when they subscribe. This can be set to days, weeks, months or years in the second drop down. Then just decide on the number from the first drop down. So 1 year, or 30 days, I'm sure you get the picture. :-)

Price

The currency is set within the options area. If you skipped over or forgot about that part of the tutorial, and your stuck wondering how to change it to USD or something else then rewind and checkout the part of this tutorial about the Options page.

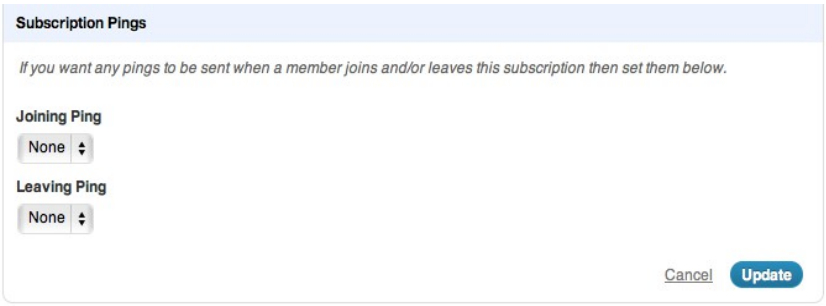
Just enter the amount here you wish to charge for this level, for the period of time specified.

You can have multiple Access Levels added here, this will create you drip content if you wish. Giving users access to something for X amount of time, before giving them access to something else, or more. Good for customer loyalty as well.


Membership levels
These are the levels that are part of this subscription and the order a user will travel through them.
Starting Point
A new signup for this subscription will start here and immediately pass to the next membership level listed below.
Level 1
Remove
Mode :
Finite
Period :
16
day(s)
Price :
20.00
GBP
Mode details
Finite - user remains at this level for a set period of time before ending
Indefinite - user remains at this level for ever.
Serial - user remains at this level for a set period of time and is then renewed at the same level
Note: - depending on the payment gateway used, changing the price will not alter subscriptions charged to existing members.
Level 2
Remove
Mode :
Serial
Period :
16
day(s)
Price :
20.00
GBP
Mode details
Finite - user remains at this level for a set period of time before ending
Indefinite - user remains at this level for ever.
Serial - user remains at this level for a set period of time and is then renewed at the same level
Note: - depending on the payment gateway used, changing the price will not alter subscriptions charged to existing members.
DROP HERE

And the last part of this section is for pings, if you have set some up and wish to use them

for this Subscription Level, then set it here:



Once your all done, just click the **Add** or **Update** button.

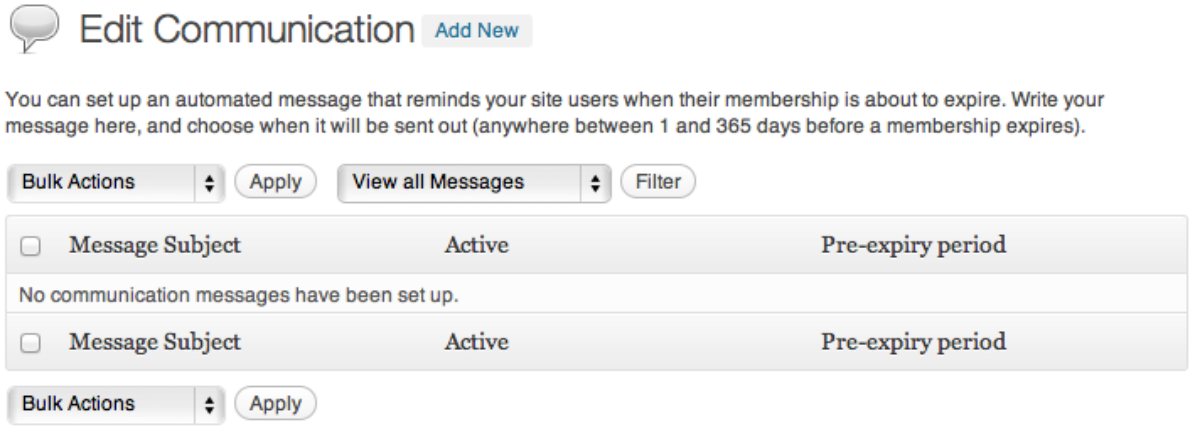
Don't forget though to make sure the Subscription Level is both **Active** and **Public**, unless of course you want it some other way. :-)

Just thought I'd mention it thought because one of the biggest support questions is about Subscription Levels not being shown on the front of the site, most of the time is because they are deactivated or simply not public.

Communications

So we are nearly at the end of it all now, its almost sad to see you all go off on your own with this plugin, but you have come a long way, may the Force be with you on this! :-)

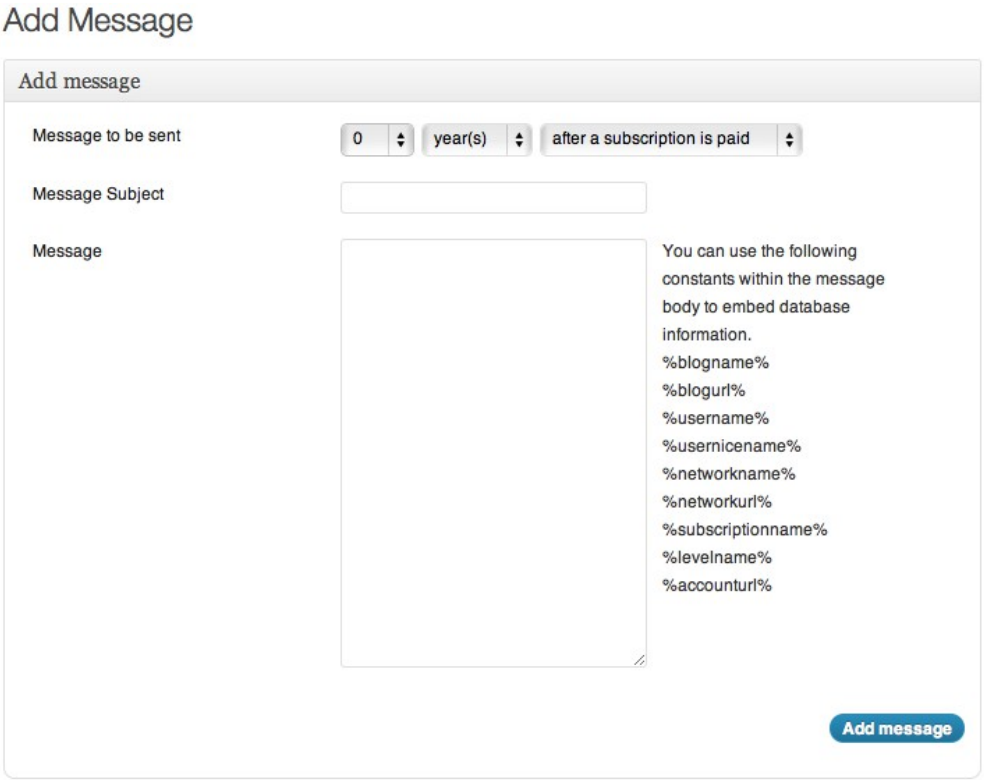
Communications is a real cool feature, one which you might not always hear to much about. But nonetheless its power is awesome!


Edit Communication
Add New
You can set up an automated message that reminds your site users when their membership is about to expire. Write your message here, and choose when it will be sent out (anywhere between 1 and 365 days before a membership expires).
Bulk Actions
Apply
View all Messages
Filter
Message Subject
Active
Pre-expiry period
No communication messages have been set up.
Message Subject
Active
Pre-expiry period
Bulk Actions
Apply

This feature will let you send out an email to your users X amount of days, weeks, months or even years after someone has paid for a subscription. This could be a personal welcome message, some handy tips, a money off coupon or anything else you like.

You can also send out messages X amount of days, weeks, months and years before the renewal is due, so before the subscription expires. This could be a “Its been great having you around, we really love you” type email, or you could extend another offer to them, some promo stuff or again... Anything else you like.

Click on the **Add New** button to create a new message for your members.



I think this is all self explanatory, when the message is sent, before expiry, after signup, etc. What the email subject should be and then the body contents.

We then have a number of constants, or tags for you to use. Here is what they do:

%blogname% - Displays your Blog Name.

%blogurl% - Displays your Blog URL.

%username% - Displays the Username of the member.

%usernicename% - Displays their chosen Nice Name.

%networkname% - Displays your Network Name (Multisite Install).

%networkurl% - Displays the Network URL (Multisite Install).

%subscriptionname% - Displays the Subscription Name they are currently on.

%levelname% - Displays the Level Name they are currently on.

%accounturl% - Displays their Account URL.

You can use any of those whilst typing out a message. When you are done, just click on **Add Message** button and thats it.

You will need to click on the Activate option by hovering over the message, otherwise this message will never be sent out.

All done..... That was an epic manual, the largest yet for WPMU Dev I thinks..... Is this thing still on? *_tap_* *_tap_*,You awake? Hello? Anyone still reading? Three penguins walk into a bar.....

Constants

The following can be added to your **wp-config.php** found within your root directory which if on cPanel would be:

/public_html/

Within the administration area by default when setting up access you can only see **25** posts, You can extend that with the following code. Just change the number to something you would like. Keep in mind the higher the number, the longer the process time and the more likely your PHP will either timeout or present Memory errors.

define('MEMBERSHIP_POST_COUNT', 25);

This is the same as the option for posts, however it controls the amount of pages. By default this one is restricted to **50**.

define('MEMBERSHIP_PAGE_COUNT', 50);

As with the above options we can also define how many groups to pull. The default is **50**.

define('MEMBERSHIP_GROUP_COUNT', 50);

Determines the maximum charge listed in the charges drop down

define('MEMBERSHIP_MAX_CHARGE', 300);

Allow comments to be shown in the negative comments rule

define('MEMBERSHIP_VIEW_COMMENTS', false);

If admin is not the default admin for the membership plugin, you can change that by adding the users username here:

define('MEMBERSHIP_MASTER_ADMIN', 'admin');

By default on each site, the person who activates the Membership plugin automatically becomes the admin for the plugin. The default is **yes** but you can change that to **no**.

define('MEMBERSHIP_SETACTIVATORAS_ADMIN', 'yes');

define('MEMBERSHIP_VERSION_KEY', 'yes');

Network Only Setting: If you are wanting to install membership network wide whilst offering subscriptions across your network then you may set the **Global Tables** to true. By default it is **false**. (If each site is independent, and has its own admins/owers then leave this as false)

define('MEMBERSHIP_GLOBAL_TABLES', false);

Network Only Setting: When enabling global tables you can also set the main site by ID. In most cases this will be the first site within your network which by default is **1**

define('MEMBERSHIP_GLOBAL_MAINSITE', 1);

Network Only Setting: You can restrict all Addons Super Administrators.

define('MEMBERSHIP_ADDONS_ONLY_SUPERADMIN', true);

Common FAQ

Where are my Subscriptions?

If they are not there for members to see then chances you you did not make them public or active.... Or both.

Its not working? I see the content and shortcodes?

You are most likely logged in with an Admin account if you see the shortcodes.

You might also have the Membership disabled in the settings.

- See the Membership dashboard or your WP Admin bar to activate.

My FREE members register but cannot login. It says they are not “Active”.

You probably have the Free Gateway Enabled whilst also taking a premium with another. Make sure your Free Gateway is NOT activated and that you are using a price of $0.00 along with a Fintie or Indefinite Subscription.

You may also need to turn on “Allow Incomplete Signup” from the options panel. This will mean if your users do not complete signing up for a subscription they will still be able to log in. Otherwise if they signup and do not complete the process of getting a subscription (even a free one) they be shown as not active.

Can Membership installation control access to my Multisite Sites?

Out of the box, no - it will be set up as individual membership sites.

The following is for ADVANCED users who can support their installation once they make these changes. There is no documentation on how this will affect your site, please do not proceed with this unless you are sure you can service your issues.

You can set the plugin to use "global tables" which will enforce it to use a common single set of tables for the entire network, then when you network activate it will run across the whole network as a single membership system and be managed via the network admin panel.

The define you need to set is in membershipincludes/functions/membershipconfig.php (along with a few others you can tweak) - you can also set them in your wp-config.php file to ensure they stay across updates:

```
if(!defined('MEMBERSHIP_GLOBAL_TABLES'))
define( 'MEMBERSHIP_GLOBAL_TABLES', true);
if(!defined('MEMBERSHIP_GLOBAL_MAINSITE'))
define( 'MEMBERSHIP_GLOBAL_MAINSITE', 1);
```

What Few other files?

They are all in that config file - they should be pretty much self explanatory from their names

Does this mean that protecting content will be the same for all sites? For example, with the use of shortcodes on a subsite's page?

Only some things will be protect-able across the network. Shortcodes will work, but protecting posts may have unpredictable effects. Category protection is based on ID's, so if the categories you want to protect have the same ids in all sub-sites then that will work, etc..

Why are my users no in the user panel, but show in the Network users area?

Chances are you also have BuddyPress running and your members are signing up through the BuddyPress registration forms this will create them a account with your network.

Disable your BuddyPress forms and let your users signup through the Membership forms instead they will then get a role within the site on your network they are signing up through.

Still stuck and need some help?

Then pop on over to our forums and open a thread, one of our support staff will be along to help you out.

http://premium.wpmudev.org/forums/

Thanks for being a WPMU Dev Member!

Docs Revision 3.0.25 – Timothy Bowers – Incsub.
Docs Revision 3.0.26 – Timothy Bowers – Incsub.
Docs Revision 3.0.27 – Timothy Bowers – Incsub.
Docs Revision 3.0.28 – Timothy Bowers – Incsub – 3028/11072012
Docs Revision 3.0.29 – Timothy Bowers – Incsub – 3029/14072012
Docs Revision 3.1.0.1 – Timothy Bowers – Incsub – 3101/03082012